

# Open Fleet

Version 3.0.64



## User Guide

**The next generation of the  
WebBookIT Software Package**



## Table of Contents

Introduction.....	5
Printing this Manual.....	6
Installation.....	7
First run .....	8
The Screen .....	9
The Toolbars .....	10
The Find Box .....	10
Booking a Vehicle.....	11
Manually Selecting a Vehicle (Availability policy dependent) .....	13
Recurring Bookings .....	14
Outlook Integration .....	15
Find a Lift .....	17
Passengers and Co-Drivers .....	18
Splitting the cost of the trip.....	19
Cancelling .....	20
Cancelling a Booking.....	20
Cancelling a Lift .....	20
Entering the Cancellation details .....	21
Running Sheet (Availability is policy dependent) .....	22
<b>Administrators Section.....</b>	<b>26</b>
What's New .....	27
Getting Started .....	28
Determining Fleet Administrators .....	28
Determining Other Important Roles .....	29
Determining and Implementing Organisation Policy .....	30
Configuring Lists .....	30
Organising Pools.....	30
Entering Vehicles.....	30
Entering Users.....	30
Entry of Existing Bookings.....	30
User Account Types.....	31
Functions of User Account Types.....	32
Users .....	33
Read Only .....	36
Deleting Users.....	36
Usernames and passwords .....	36
Smart Booking .....	37
Sample Booking.....	37
Vehicle Pools .....	39
Allocating Vehicles into Pools.....	40
Running Sheet.....	41
Key in / Key Out .....	42
Switching Vehicles .....	43
Pool Booking Slip.....	44
Reports .....	46
Sample Reports .....	46
Region Filter .....	47
Utilisation Reports .....	48

Vehicles Due for Service Report .....	49
Vehicles Due for Warranty Inspection .....	49
Vehicles on Order Report .....	50
Vehicles Disposed Report.....	50
Vehicles Purchased Report .....	50
Vehicles Due for Replacement Dates Report .....	50
Vehicles Average Daily Klms Report.....	51
Vehicle Window .....	52
Add a new vehicle.....	53
Minimum Data to collect .....	55
Driver History and FBT .....	56
Replacing a vehicle .....	57
Decommission a vehicle .....	57
Vehicle Expenses .....	58
Non-Vehicles .....	59
Lists .....	60
Filtering Lists .....	61
Tariffs List .....	61
Pools List .....	63
Service Types List.....	64
Warranty Inspection Plans .....	64
Options.....	65
Organisational Policies .....	67
Billing .....	74
Defaults .....	76
Message Wording .....	78
Odometer entry .....	80
Monthly Audit.....	80
Import from a fuel file supplied from the fuel company .....	81
Import from an Excel file.....	81
Entered upon vehicle return. ....	83
Adhoc entry.....	83
Double Booking Prevention.....	84
Double Booking Report .....	84
Service and Repair of Vehicles.....	85
Importing Users .....	87
Problems .....	88
Importing Fuel Transactions .....	89
Posting.....	91
Importing Fleet Management Fees .....	92
Posting.....	95
Importing Odometer Readings.....	96
Import from an Excel file.....	96
Where are odometer readings stored? .....	98
How odometer values are updated? .....	98
Reversing Imports .....	99
Monitoring Tasks .....	100
Daily.....	100
Weekly .....	100
Monthly.....	100

Video Help .....	101
Support.....	102
Support Contact Details .....	102
Previous Version .....	102
Quick Support .....	102
Response Times .....	103
Data Field Glossary.....	104
Vehicles Screen.....	104
Technical Specifications .....	108

# Introduction

Open Fleet is a total pool booking and vehicle fleet management solution.

Open Fleet gives the vehicle fleet manager/s the ability to choose which users may have access to the system, and what functions each user may perform. Some users may be able to book for others, some may manage a key store, and some may just be permitted access to certain reports. Each organisation can choose to roll the software out to all staff, or to only some high use department staff, who could then book vehicles for staff within their own department.

Open Fleet utilises **Smart Booking technology** that other pool booking software packages don't use. The system chooses the car for the user based on leaving the maximum amount of consecutive time available for other future bookings yet to come. This method utilises the vehicle fleet to its maximum potential, while still allowing for special request vehicles such as station wagons or minibuses.

Open Fleet typically runs on the client's own SQL servers. Unlike other systems, the client maintains and owns the data. This eliminates the need for booking fees though hosting solutions are available if the client organisation prefers.

Open Fleet is task focused. For example, screens titles are, "Book Vehicle, or Find a Lift. This will assist current transport staff by reducing the learning curve and anxiety level that would normally occur with new software. Rather than think about the new software staff can just remain focused on the task that they are performing.

The software is written by Jay Burleigh, who has twenty-five years experience in the field of Information Technology. Burleigh's fleet management software has been in use for almost 15 years. Client references sites are available.

Burleigh has continually delivered first rate service, with minimal to zero downtime.

IF YOU ARE NOT SATISFIED WITH THIS SOFTWARE, WITHIN YOUR CURRENT SUBSCRIPTION PERIOD, OR WITHIN 12 MONTHS, WHICHEVER IS THE SHORTER, YOUR CURRENT SUBSCRIPTION WILL BE RETURNED TO YOU AND YOU MAY CONTINUE USING THE SOFTWARE FOR THE REMAINDER OF YOUR CURRENT SUBSCRIPTION. THIS WARRANTY IS IN ADDITION TO ANY STATUTORY RIGHTS.

Training and demonstration videos are available at <http://www.itguaranteed.com.au/>

# Printing this Manual

This manual is not a static book. It changes and grows, as do the functions of Open Fleet. For this reason printing this manual is not recommended.

If your intention is to take the manual out in the sunshine and sit and read completely, then that is fine. But please, recycle it immediately upon completion.

It is not recommended that this manual be printed out, bound and kept on the shelf as a reference. Functions and procedures within Open Fleet change and are enhanced from time to time. The version number on the front of this manual indicates what version of Open Fleet this manual is current with.

The latest version of this manual may be found at

<http://www.itguaranteed.com.au/updates/OpenFleet - Administrators Guide.pdf>

# Installation

### To install Open Fleet

- ① Click this link (or copy it into your browser)
- ② <http://www.itguaranteed.com.au/Install.aspx?product=Open Fleet>
- ③ Follow the onscreen Instructions.  
By Default Open Fleet Installs into C:\Program Files (Non-UAC)\Open Fleet

### Updating

Open Fleet manages its own update process. When Open Fleet starts it checks the internet for the latest version. If it finds one, it downloads the latest version, and notifies the user. The user merely has to click OK when they are ready, and the old version will be swapped out for the newer version. The immediately older version is retained in the installation folder should it be required for a reversal.

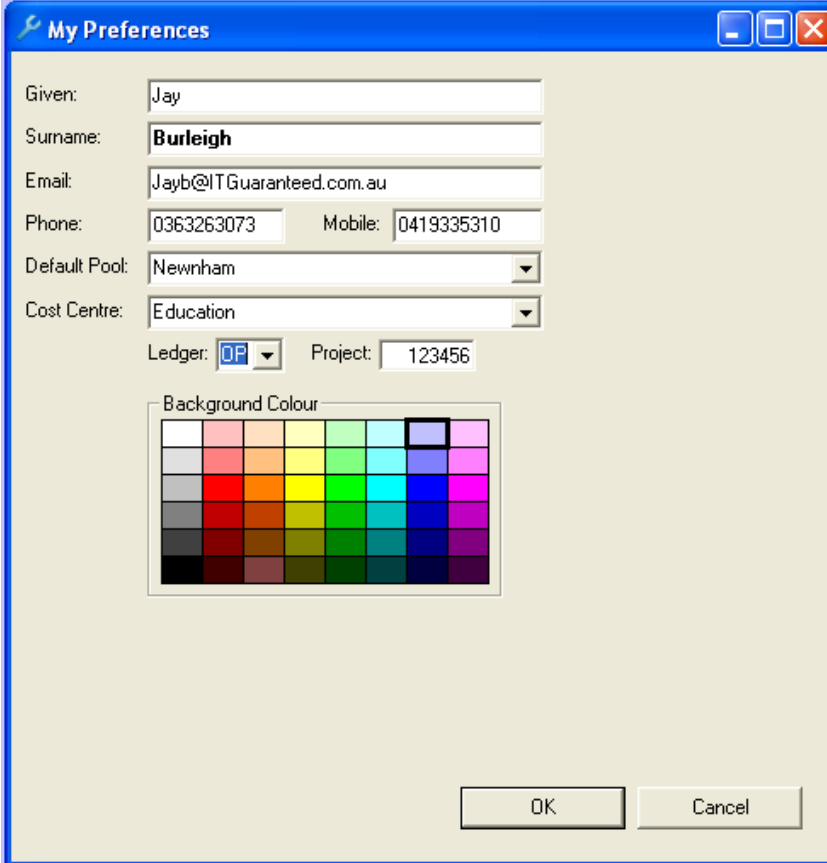
### To uninstall Open Fleet

- ① Delete the folder where Open Fleet resides. Typically this is C:\program files (Non-UAC)\Open Fleet

Open Fleet does not use the registry or any other folders to store information

## First run

The first time Open Fleet may ask for all of your details. It is important to enter all details. Some details such as email address may be needed in the event of changes to your bookings, and some may be needed to contact you on the road such as your mobile phone number.



The 'My Preferences' dialog box is shown with the following fields and values:

- Given: Jay
- Surname: Burleigh
- Email: Jayb@ITGuaranteed.com.au
- Phone: 0363263073
- Mobile: 0419335310
- Default Pool: Newnham (dropdown menu)
- Cost Centre: Education (dropdown menu)
- Ledger: OP (dropdown menu)
- Project: 123456
- Background Colour: A 6x6 grid of 36 color swatches is displayed.

At the bottom right, there are 'OK' and 'Cancel' buttons.

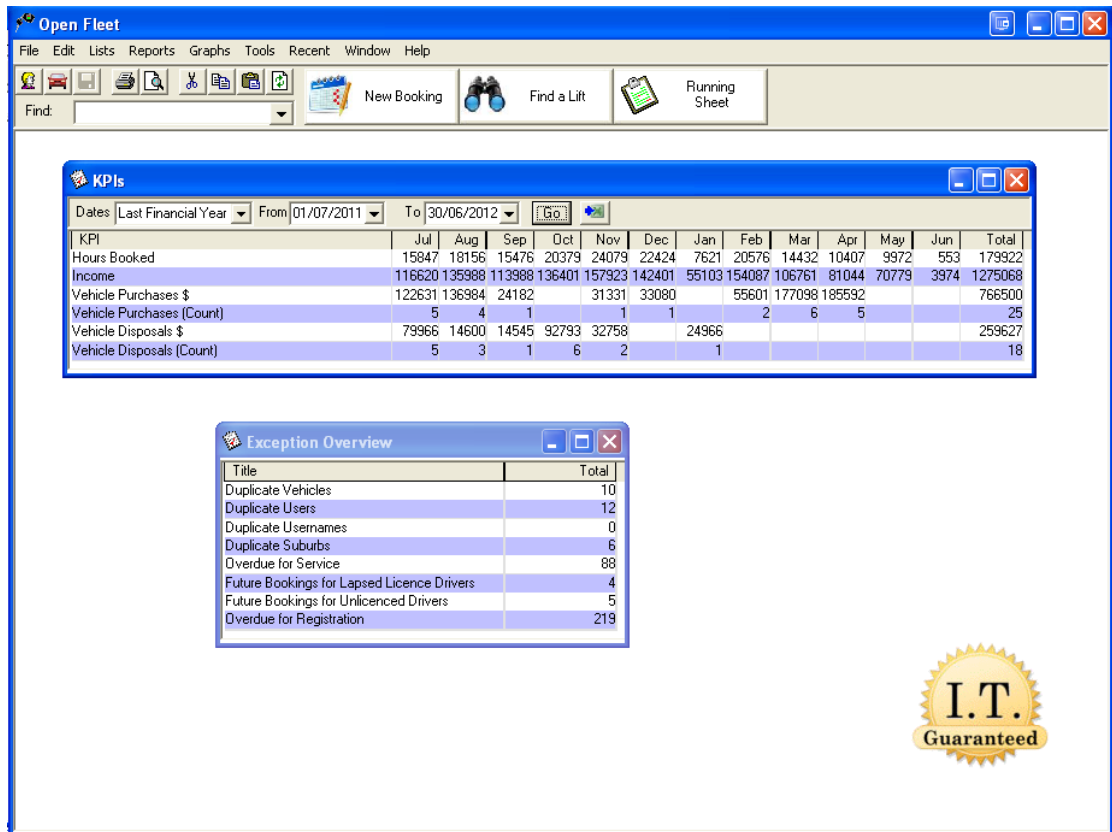
- 1 Enter in ALL details and select a default pool and cost centre.
- 2 Click **OK** to save all changes.

You are now ready to use Open Fleet.



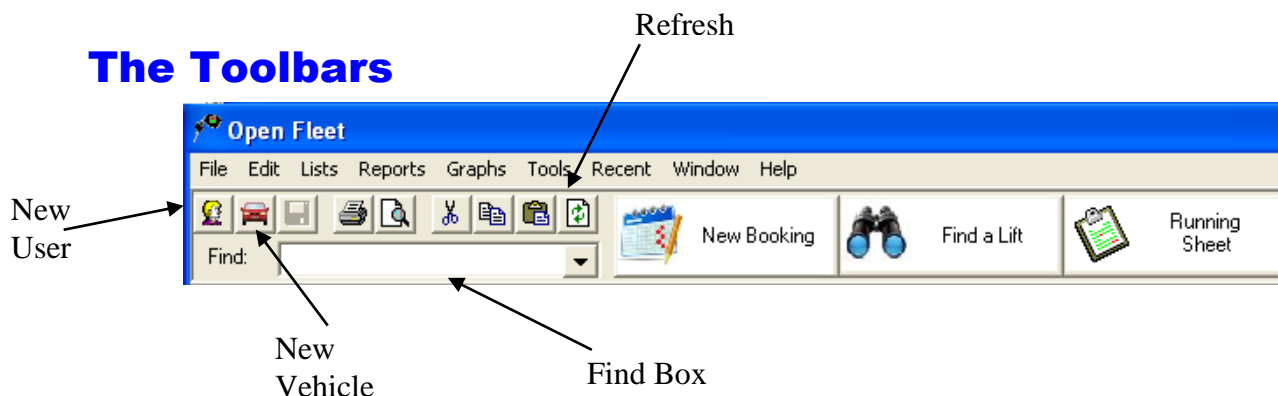
## The Screen

Open Fleet features an easy to use MDI (Multiple Document Interface) complete with toolbar and menu bar



Open Fleet with two reports open

## The Toolbars



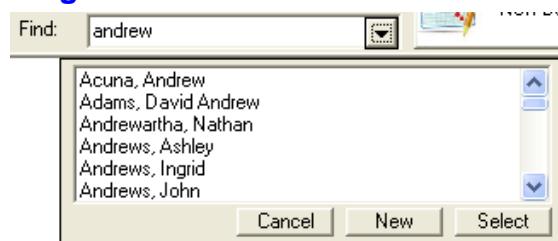
## The Find Box

The Find Box is the one stop shop for finding anything in Open Fleet. The Find Box can find names, vehicles, and bookings.

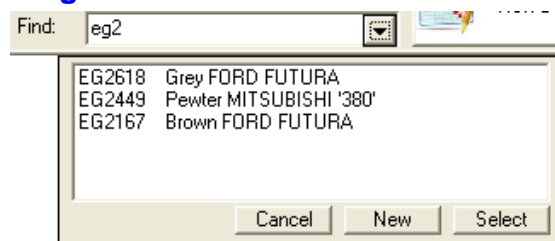
### Finding bookings on a specific date



### Finding Names



### Finding Vehicles




## Booking a Vehicle

The simplest type of booking in Open Fleet is where a driver wishes to book a vehicle for themselves. If the user does not have an special Open Fleet user privileges (not an Administrator nor a Booking Admin for example) they will not be able to select any other driver. This means the user may only book for themselves. *Later in the manual we will see how users may be permitted to make bookings for others.*

### To make a booking

Note: To advance from one field to the next press the **Tab** key or click with the mouse into the next field.



- ① To open the booking window click the  button on the toolbar.
- ② Enter the **dates** and **times** that the vehicle is required.
- ③ Select an appropriate **Pool** where you may collect your vehicle.  
Some organisations may require you to only select from particular Pools. You should also select a Pool that contains an appropriate vehicle for your journey. For example, do not choose a small/mid size pool if the vehicle is going to travel over rough terrain.
- ④ Click **Find Available Vehicle**.  
The Pools will be searched for an available vehicle. Sometimes another vehicle pool will need to be searched.
- ⑤ Enter your **Destination**.  
When you leave this field a popup box will ask you to select a matching destination from a list.
- ⑥ Check your **Cost Centre** information and correct it if required.

- 7 Enter a **Requisition Number** for the Trip. This may be mandatory in some organisations. In others it may not be required and hence not requested.
- 8 Enter a **Purpose** for the Trip. This may be mandatory in some organisations. In others it may not be required and hence not requested
- 9 Check the box to signify your agreement with the condition.
- 10 Click **Save**.  
The booking will now be saved.

The buttons to the right of the booking now become available.

Using these buttons users may,

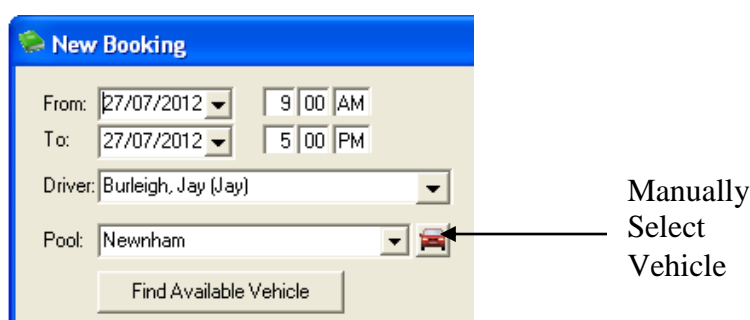
- Cancel the booking
- Add Passengers or Co-Drivers
- Email the booking to the driver.
- Add the booking to their calendar
- Print a Confirmation Slip
- View the booking history and hire fees.

## Manually Selecting a Vehicle (Availability policy dependent\*)

Some organisations may permit their staff to be able to select which vehicle they want to book. If this is the case there will also be a Select Vehicle Button available on the Booking Screen.

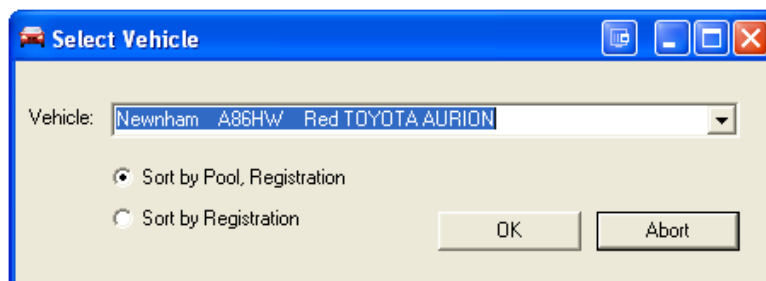
### Warning!

Manually selecting vehicles will interrupt the 'smart booking' feature of Open Fleet. This will result in decreased capacity of the overall pool.



### To manually select a vehicle

- 1 Click the **Manual Select Vehicle** Button. This will display the Select Vehicle Dialog.



**This dialog will only show the vehicles that are available for the dates and times selected in the booking window**

The list may be sorted by Pool, or by Registration. Open Fleet will remember the sort order for subsequent bookings.

\* Some organisations choose to disable or limit this functionality for enhanced fleet utilisation

## Recurring Bookings

**Recurring bookings** can be made easily and quickly. Many recurring options are available including, daily, weekly, fortnightly, or monthly.

The 'Repeat' dialog box shows the following configuration for daily repeats:

- Repeat** section:
  - ☐ No Repeat
  - ☒ **Daily**
  - ☐ Weekly
  - ☐ Monthly
- Frequency**: Every  Day(s)
- End Condition**:
  - ☒ End After  Occurances
  - ☐ End By

### Scheduling Daily Repeats

The 'Repeat' dialog box shows the following configuration for weekly repeats:

- Repeat** section:
  - ☐ No Repeat
  - ☐ Daily
  - ☒ **Weekly**
  - ☐ Monthly
- Frequency**: Every  Week(s) on
- Days**:
  - ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday
  - ☐ Friday ☐ Saturday ☐ Sunday
- End Condition**:
  - ☒ End After  Occurances
  - ☐ End By

### Scheduling Weekly Repeats

The 'Repeat' dialog box shows the following configuration for monthly repeats:

- Repeat** section:
  - ☐ No Repeat
  - ☐ Daily
  - ☐ Weekly
  - ☒ **Monthly**
- Frequency**:
  - ☒ Day  of every  Month(s)
  - ☐ The  of every  Month(s)
- End Condition**:
  - ☒ End
  - ☐ End By

Open dropdown menus show the following options:

- The**: First, Second, Third, Forth, Last
- Day**: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday, Weekend Day

### Scheduling Monthly Repeats

## Changing Recurring Bookings

**Changing the date or times** of an existing recurring booking or in fact changing anything of a recurring booking only changes the one booking. It does not affect any other booking. Those other booking will still remain at the same time.

Similarly **Adding passengers to a recurring booking** only adds the passengers to one booking. They passengers are not added to all recurring bookings.

## Outlook Integration

Vehicle bookings may be easily entered into a users calendar at the click of a button, giving the driver an easy reminder of not just the booking but also the vehicle and any extra details the fleet administrator wishes to inform them of.

*This function is dependent upon your installation of Outlook. Depending how Outlook is configured in your organisation it may or may not work.*

Booking 64005 Burleigh, David - 05/08/2011

From: 05/08/2011 12:00 PM  
To: 05/08/2011 1:00 PM  
Driver: Burleigh, David  
Pool: Newnham  
Change Dates and Times

Recurrence  
☒ No Repeat  
☐ Daily  
☐ Weekly  
☐ Monthly

Make Booking  
Vehicle: Registration: B90GW, White HOLDEN Cruze  
Destination: Inveresk Enter Destination or part of. eg. hob  
Cost Centre: Centre for Advancement L&T Ledger: OP Project: 055277  
Purpose: meeting Reason for Journey  
Requisition No: 12345  
☐ I certify the above named driver holds a current licence to drive this motor vehicle  
Save

Close  
Cancel Booking  
Passengers / Co-Drivers  
Email Booking to Driver  
**Add this to my Calendar**  
Print Booking Slip  
Show Fees & History

- 1 Click the Add this to my calendar button.

Pool Vehicle Booking:0 - Jay Burleigh (Jay) - Registration: G17273, WHITE TOYOTA COROLLA Hatch

File Edit View Insert Format Tools Actions Help  
Save and Close Recurrence... Invite Attendees... !

Appointment | Scheduling

⚠ This appointment occurs in the past.

Subject: Pool Vehicle Booking:0 - Jay Burleigh (Jay) - Registration: G17273, WHITE TOYOTA COROLLA Hatch  
Location: This is an online meeting using: Microsoft NetMeeting

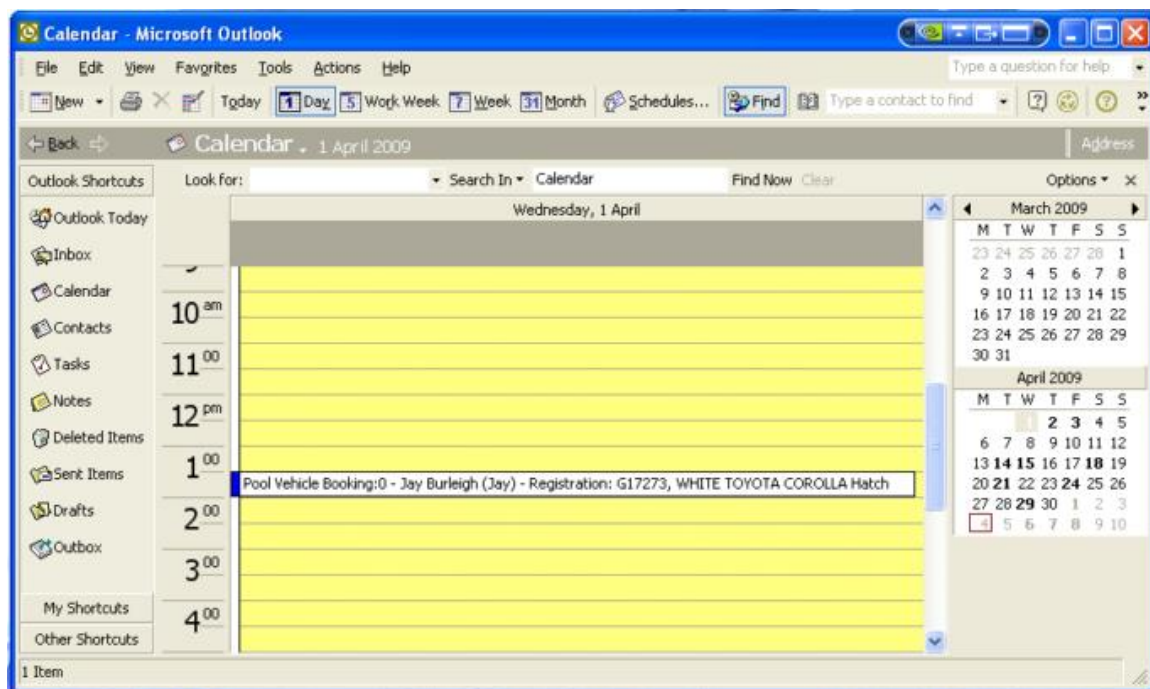
Start time: Wed 1/04/2009 1:30 PM All day event  
End time: Wed 1/04/2009 2:00 PM

Reminder: 15 minutes Show time as: Busy Label: None

To alter booking please contact car pool.  
Please collect car from Car park 1.  
Note: car has existing dent to Right driver side door.

Contacts... Categories... Private

- 2 Click Save and Close



**The result: Pool Booking in Outlook.**



## Find a Lift

Find a Lift screen enables users to quickly and easily find a lift with someone who has already booked a vehicle. Each trip shared is a vehicle saved and free for another use. Costs are also shared.

**Find a Lift**

Date lift required: 23/06/2011 Start: Launceston  
 Date Returning: 24/06/2011 Destination: Hobart Go

**Travelling Both Ways on the Same Days**

Origin	Departure Date	Departure Time	Destination	Return Date	Return Time	Driver	Phone
Launceston	23/06/2011	4:00:00 PM	Hobart	24/06/2011	7:00:00 PM	Kim Docherty	
Launceston	23/06/2011	5:00:00 PM	Hobart	24/06/2011	7:00:00 PM	Terry Cripps	

**Travelling to Destination**

		Time	Driver	Phone	mobile	email
Travelling to Hobart	Leaving At	5:00:00 PM	Dean Gower			Dean.Gower@ITGuaranteed.com.au
Travelling to Hobart	Leaving At	9:00:00 AM	Isabel Burke			Isabel.Burke@ITGuaranteed.com.au
Travelling to Hobart	Leaving At	4:00:00 PM	Kim Docherty			Kim.Docherty@ITGuaranteed.com.au
Travelling to Hobart	Leaving At	5:00:00 PM	Terry Cripps			Terry.Cripps@ITGuaranteed.com.au
Returning to Hobart	Arriving at	10:00:00 AM	Clair Ricks			Clair.Ricks@ITGuaranteed.com.au
Returning to Hobart	Arriving at	6:45:00 PM	David Hanstein			David.Hanstein@ITGuaranteed.com.au
Returning to Hobart	Arriving at	8:30:00 AM	Jane Jetson			Jane.Jetson@ITGuaranteed.com.au


**Return Journey**

		Time	Driver	Phone	mobile	email
Returning to Hobart	Arriving at	6:30:00 PM	Teisha Bradford			Teisha.Bradford@ITGuaranteed.com.au
Travelling to Hobart	Leaving At	6:00:00 AM	Bernie Seaborn			Bernie.Seaborn@ITGuaranteed.com.au
Travelling to Hobart	Leaving At	7:00:00 AM	Darren Parkinson			Darren.Parkinson@ITGuaranteed.com.au
Travelling to Hobart	Leaving At	4:00:00 PM	Kim Docherty			Kim.Docherty@ITGuaranteed.com.au
Travelling to Hobart	Leaving At	9:00:00 AM	Leigh Padgett			Leigh.Padgett@ITGuaranteed.com.au
Travelling to Hobart	Leaving At	9:00:00 AM	Morgan Clift			Morgan.Clift@ITGuaranteed.com.au
Travelling to Hobart	Leaving At	4:45:00 PM	Ruth Chase			Ruth.Chase@ITGuaranteed.com.au

**Find A Lift Screen shows vehicles travelling to and return to the destination.**

There are many advantages for using shared trips, including shared driving, which reduces fatigue, conversation to relieve boredom and reduce tiredness in addition to making and renewing contacts and acquaintances.

### To find a lift

- 1 To open The find a lift window click the  button on the Toolbar
- 2 Enter the **dates** the lift is required and the **start** and **destination** suburbs.
- 3 Click **Go**
- 4 Locate a trip or trips that best matches the times your wish to leave and **double click on the trip**.

This will open the Passenger / Co-Driver Screen.

## Passengers and Co-Drivers

The Passengers / Co-Drivers screen gives a quick way of adding travellers to bookings. Costs may be shared according to your organisations billing policies.

For the purposes of booking and cancelling, Passengers and co-drivers are treated the same. Thus wherever this manual mentions passengers it is referring to both passengers and or co-drivers.

**Passengers / Co-Drivers**

Add Passengers or Co-Drivers

Name:

Cost Centre:  Ledger:  Project:

Travelling Direction:

☐ Both Ways ☐ To Hobart ☐ To Launceston

Travelling to Hobart on 23 Jun 2011 at 4:00:00 PM

Cancel	Name	Phone	Mobile	Email	CostCentre	Ledger	Project	Fee
	Kim Docherty (Driver)			Kim.Docherty	School of Management	OP	23045	94.5

Returning to Launceston on 24 Jun 2011 at around 7:00:00 PM - CONFIRM THIS TIME WITH DRIVER


Cancel	Name	Phone	Mobile	Email	CostCentre	Ledger	Project	Fee
	Kim Docherty (Driver)			Kim.Docherty	School of Management	OP	23045	94.5

The Passenger Screen showing a booking that currently has no passengers.

### To Open the Passenger or Co-Driver Window

- 1 Either Click Add Passengers from the **Booking** Window  
or  
Double click on the Trip in the **Find A lift** Window  
or  
Right Click on the booking from the **Running Sheet** (If granted access to Running Sheet) and select Open Passenger List.

### To Add a Passenger or Co-Driver to a Booking

- 1 Enter the Surname (or part of eg Bur ) of the Passenger, then press **Tab** or click the dropdown box  on the name field.

- 2 Select the passenger from the list.  
The passengers default department and account settings will be filled.
- 3 Adjust the passenger's department and account fields if required.
- 4 Select the direction of travel required.
- 5 Click the **Add** button.  
The passenger / co-driver will be added to the trip and the new costs will be calculated according to the organisations billing policies.

**Passengers / Co-Drivers**

Add Passengers or Co-Drivers

Name:

Cost Centre:  Ledger:  Project:

Travelling Direction

☒ Both Ways ☐ To Hobart ☐ To Launceston

Travelling to Hobart on 23 Jun 2011 at 4:00:00 PM

Cancel	Name	Phone	Mobile	Email	CostCentre	Ledger	Project	Fee
<input type="checkbox"/>	Kim Docherty (Driver)			Kim.Docherty	School of Management	OP	23045	47.25
<input type="checkbox"/>	Jay Burleigh	041933531	0363263073	Jay.Smith@l	Education	OP	123456	47.25

Returning to Launceston on 24 Jun 2011 at around 7:00:00 PM - CONFIRM THIS TIME WITH DRIVER

Cancel	Name	Phone	Mobile	Email	CostCentre	Ledger	Project	Fee
<input type="checkbox"/>	Kim Docherty (Driver)			Kim.Docherty	School of Management	OP	23045	47.25
<input type="checkbox"/>	Jay Burleigh	041933531	0363263073	Jay.Smith@l	Education	OP	123456	47.25

The same booking, but now with a passenger travelling both ways.

## Splitting the cost of the trip

If you need to split the cost between two or more cost centres, just add yourself as a passenger specifying the other cost centre details. The cost of the trip will be split evenly according to how your Fleet Administrator has implemented Open Fleet.

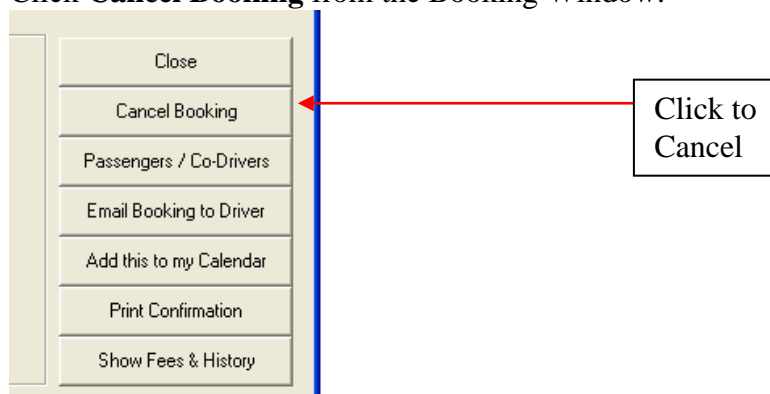
# Cancelling

Bookings may be cancelled according to organisational policies.

## Cancelling a Booking

To open the Cancellation Window to cancel a booking

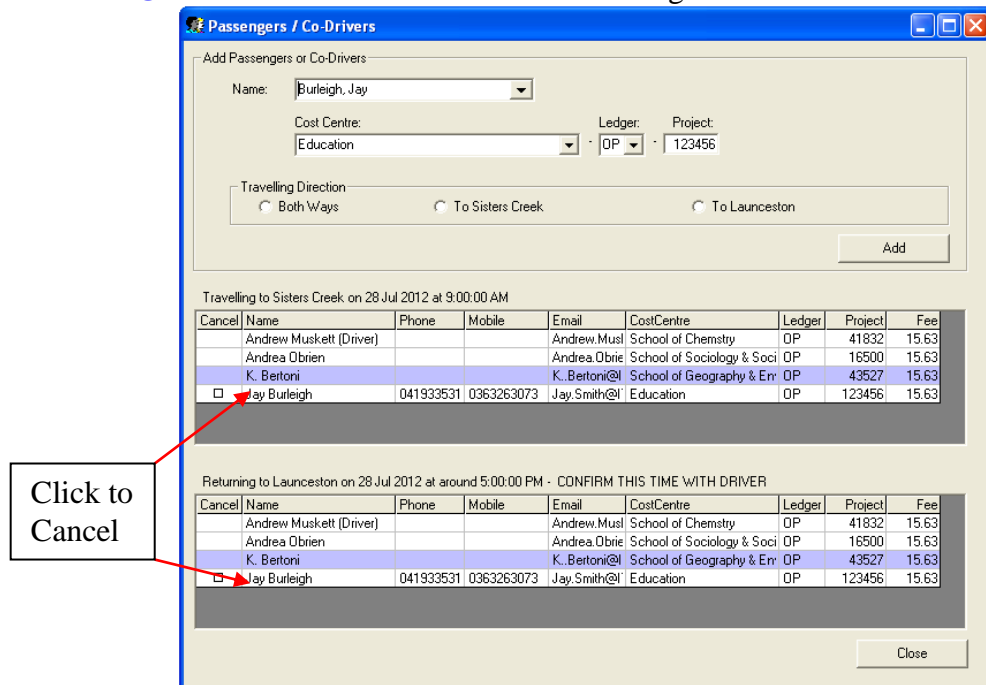
- 1 Click **Cancel Booking** from the Booking Window.



## Cancelling a Lift

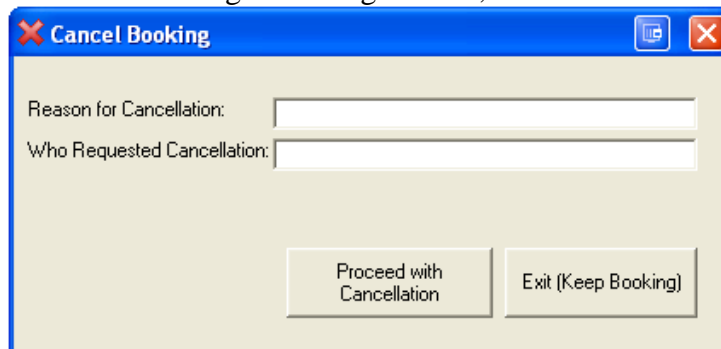
To open the Cancellation Window to cancel a Lift

- 1 Click in the Cancel Box on the Passengers / Co-Drivers Window.



## Entering the Cancellation details

Whether cancelling a booking or a lift, the cancellation window is the same.



### To cancel the booking or lift,

- ① Enter the Reason for the cancellation.
- ② Enter the name of the person who requested the cancellation.
- ③ Click **Proceed with Cancellation** to cancel the booking.  
The booking or lift will be cancelled.

#### Note:

Cancelling Bookings with passengers will be handled as follows:

**If** one of the passengers that is travelling **both ways**, is authorised to drive the organisations vehicles, then that passenger will be upgraded to the driver of the vehicle.

Otherwise the booking will be cancelled and so to will be the lift for each of the passengers.

Everyone will be notified by email of these changes to bookings, automatically by the system.

### Permissions: Who can cancel a booking or a lift.

Any user with an elevated account type may cancel a booking or lift.

A driver may cancel their own booking or may cancel the booking for a lift on their trip.

A Passenger or Co-Driver may cancel their own lift.

A cost centre manager may cancel bookings or lifts if it is within their cost centre allocations.

## Running Sheet (Availability is policy dependent\*)

The Running Sheet is a special report that displays which vehicles are booked, some circumstances by whom.

The Running Sheet is only available if your organisation has decided to permit all users access to this screen. There may be privacy reasons, or utilisation reasons, amongst others, why access to this screen is not granted to all users of Open Fleet.

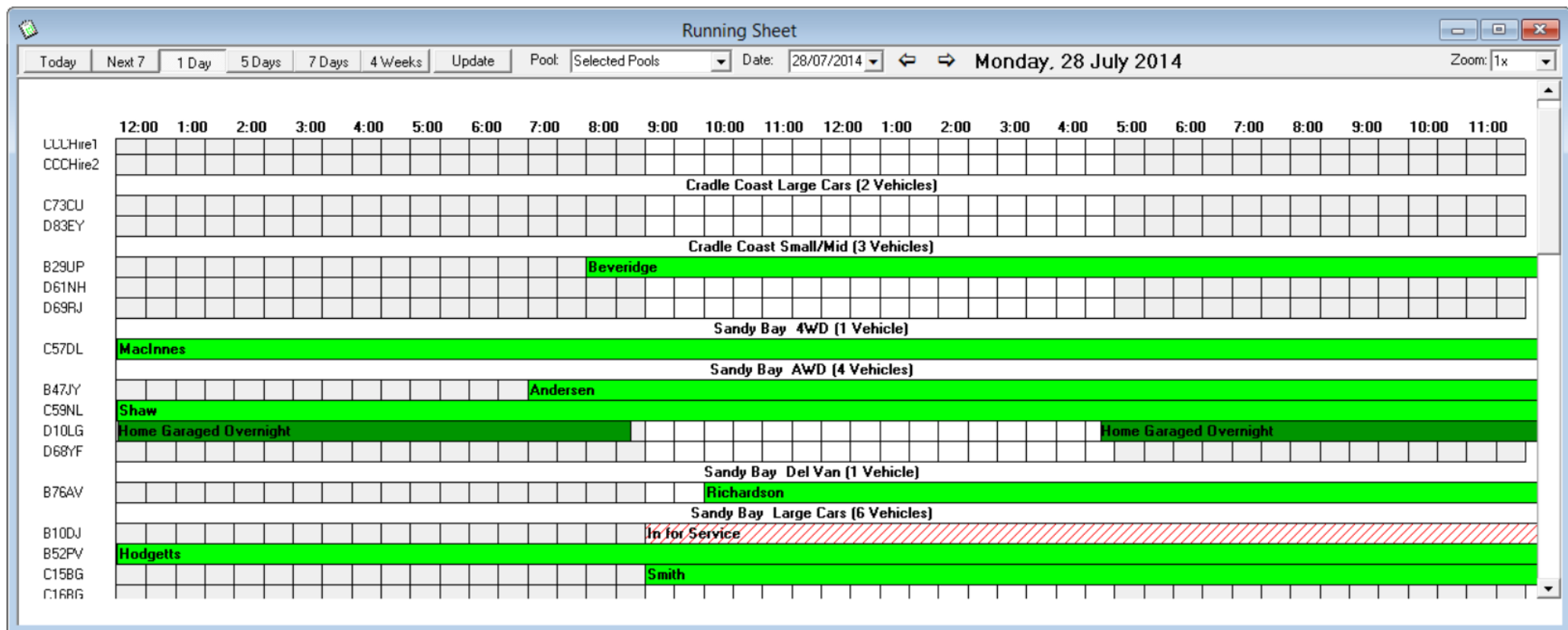
The Running Sheet has two views, Month View and Day View.

The Running Sheet displays a graphical chart of bookings. Double bookings and overlapping bookings are shown in red.

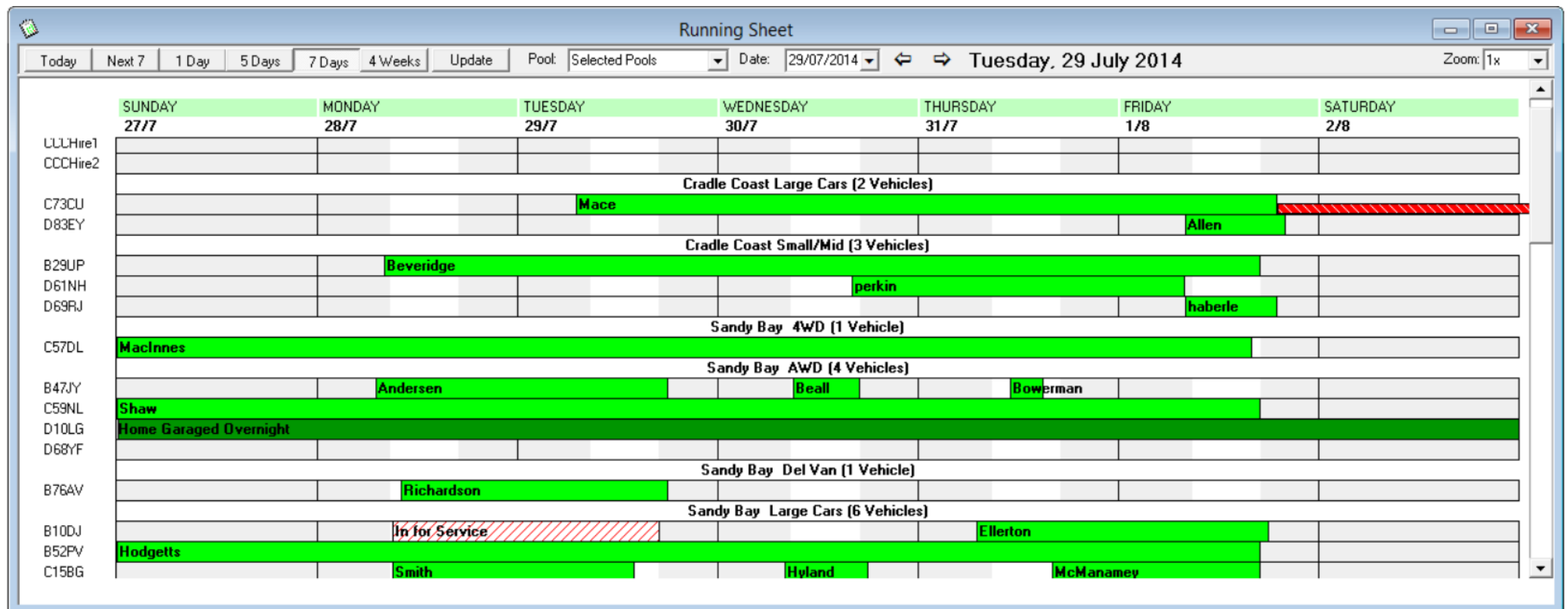
A user can select from show all pools, just one pool or a selection of pools.

---

\* Some organisations choose to disable or limit this functionality for enhanced fleet utilisation



Day view of the Running Sheet



7 Day view of the Running Sheet



## To select a vehicle and make a booking (availability is policy dependent\*)

1. Click in one of the blank (White or Yellow) spaces and drag to the rate required.

1:30	12:00	12:30	1:00	1:30	2:00	2:30
Newnham (11 Vehicles)						

2. Upon release of mouse button the New Booking window will open with the date & vehicle pre-filled.
3. Continue making the new booking as per making New Booking instructions.

---

\* Some organisations choose to disable or limit this functionality for enhanced fleet utilisation

# **Administrators Section**

# What's New

Open Fleet 3.0 includes many new features from its previous incarnation as WebBookIT 2.0

- MDI (Multiple Document Interface, allowing multiple windows to be open on screen at once.
- Find Box, which makes finding anything in the database quick and easy.
- Recent Menu, to find the most recent windows that were open, for quickly returning to a task after an interruption.
- Passengers, including multiple methods of cost sharing.
- Allowing drivers, to view Running Sheet.
- New Reports and report styles, Top 10 reports and graphs.
- Drillable reports, allowing administrators to click through the report to locate the original transaction.
- Allow Drivers to manually select a vehicle
- Ability to select a vehicle by dragging on the Running Sheet
- Vehicle Expenses can now be recorded against a vehicle including Fuel transaction imports.
- User Account Types, have been simplified to allow easier allocation of duties and permissions.
- Find a Lift has been improved for easier visual understanding of bookings.
- Numerous Options to allow Open Fleet to be configured to meet the requirements and policies of any organisation.
- Double Booking Prevention limits the number of ways a double booking can be made and reports on double bookings

# Getting Started

Open Fleet is a huge software package that brings together many functions of vehicle management and pool booking. Setting up and configuring Open Fleet requires considerable planning and work.

The Getting Started section guides administrators through the tasks that must be performed. These include:

- Determining Fleet Administrators
- Determining Other Important Roles
- Determining and Implementing Organisation Policy
- Configuring Lists
- Organising Pools
- Entering Vehicles
- Entering Users
- Entry of existing bookings.

## Determining Fleet Administrators

Fleet Administrators are responsible for managing the entire Open Fleet Software Package. This includes such duties as, Vehicle Purchasing and Disposal, Regular Servicing & Maintenance, Tracking Expenses, Setting higher level access for certain users and implementing organisational policies and procedures.

Hopefully, as you are reading this section, your organisation will have already determined that you are to be a Fleet Administrator. Congratulations! We at I.T. Guaranteed hope that your job is made easier through the use of our software. If at anytime you have any ideas for improvements then let us know.

Now that you have one Fleet Administrator it is advisable to select at least one if not two more.

**Two Fleet Administrators are recommended plus one more as a back up.** Smaller organisations may have to make do with only one.

Having more than one fleet administrator provides coverage in the case of illness, or other staff leave. It also prevents administrators from being locked out of Open Fleet Administration.

More than 4 administrators can cause problems as the old saying, “Too many cooks spoil the broth” goes. Too many administrators may cause problems by having one of them alter the work of another, and without realising cause errors or inconsistencies to appear.

## Determining Other Important Roles

In large organisations one individual cannot be expected to do all the work. Open Fleet makes it easy to delegate tasks and responsibilities to other personnel. **User Account Types** on **page 31**, of this manual describes the different account types that exist.

Here are some guides to assist you to determine who should be placed in which role.

<b>Booking Administrators</b>	<p>This is the 2nd highest User Account Type, with Fleet Administrators being the highest.</p> <p>These staff would typically be assistants to the fleet manager. They can perform (almost) all actions to do with bookings, such as making and editing bookings for all staff. They can enable users to logon</p> <p>Booking Administrators cannot manage vehicles, enter new vehicles, nor dispose of vehicles.</p>
<b>Key Keeper</b>	<p>This role is the job of handing out keys and collecting them upon return. It may also involve entering the time returned and the odometer readings of the vehicle.</p> <p>Not all organisations may require this role.</p> <p>Typically if a car pool., and hence the key cabinet, is situated remotely to the Fleet administrators, or the booking administrators location, then the task of Key hand over can be allocated to a receptionist (for example) in that area.</p>
<b>Cost Centre Manager</b>	<p>A Cost Centre Manager is like a Booking Administrator but just for one or a handful of cost centres only. That is, a cost centre manager may book for and edit bookings for users that are within their allocated cost centres. Cost Centres need to be allocated by the Fleet Administrators.</p> <p>Cost Centre Managers can also view reports on their Cost Centre/s.</p>
<b>Read Only</b>	<p>Read Only is a special permission that is in addition to another Account Type. Typically it would be given to an auditor, how could then examine the system, view the reports, but not change anything.</p> <p>By itself read only permission does nothing.</p> <p>For example someone who was a Cost Centre Manager and Read Only, could VIEW reports &amp; bookings for the allocated cost centres.</p>

### Determining and Implementing Organisation Policy

Most organisations will have already determined many policies and procedures relating to organisational use of vehicles. Open Fleet provides a means to enact these and other policies and procedures.

Fleet Administrators should familiarise themselves with the options in Open Fleet which are outlined beginning on **page 65**.

Once the policies have been determined, entering them only involves checking boxes, or entering values.

After that Open Fleet will function according to the selected settings.

### Configuring Lists

Perhaps the most laborious task in configuring Open Fleet is entering the lists.

Lists are the items that users may choose in drop down lists such as Destinations, Cost Centres, Suppliers, Tariffs. Depending on your location Some of this work may have been done for you.

**Page 60** provides a description of the lists.

### Organising Pools

Vehicle Pools are the backbone of Open Fleet and setting them up is a vital part of configuration. Beginning on **page 39** is a thorough explanation of Vehicle Pools.

### Entering Vehicles

In order for full functionality of Open Fleet each vehicle needs to have considerable information recorded. **page 52** begins a detailed description of vehicles and the minimum information required for what purposes.

### Entering Users

Users may be entered either individually (**page 33**) or by importing them from Excel via a CSV file (see **page 85**). The import makes the task of entering users very quick, but it does involve firstly bringing together a lot of information first, such as Phone number directories and usernames.

### Entry of Existing Bookings

Before allowing general booking by everyone in the organisation, or indeed by anyone other than the Fleet Administrators it is wise to test all of your work to this point. A good test is to begin the task of entering bookings from your organisations previous system, if indeed it had one, manual or otherwise.

This test may well find some holes in organisational polices and necessitate the need for review and or back tracking.

# User Account Types

The functions that may be performed within Open Fleet are determined by a User's account type. The Windows that are available to each user and the views inside those windows will differ depending on what User Account type the user has and what system Policies have been selected in the Options window. Thus some screenshots shown in this manual may differ slightly from the window that you see.

**Six types of user accounts** are available. A user may be assigned any one or a combination of account types..

- **Fleet Administrators** control the entire system and may allocate user account types to the other users. The fleet administrator has unrestricted access to the database.
- **Booking Administrators** can book vehicles for other drivers and enable other drivers to logon and book for themselves Typically they would be assistants to the Fleet Manager/s. They could be delegated the responsibility for verifying valid driver's licences.
- **Key Keepers** may check out and check in the keys to the vehicles. They may also transfer bookings from one vehicle to another. This may be needed in cases where one vehicle is late back and someone is waiting for a car.
- **Cost Centre Managers** can make bookings for other users that are in their allocated cost centre.
- **Read Only** is a special kind of permission that is added to other account types. For example adding Read Only to a Fleet Administrators account would mean that that user would be able to look at everything, every booking, every vehicle, every report, every list, But could not change, nor alter, nor add anything.
- Base users of the system are referred to as **drivers**. Some clients prefer not to allow these base users to make their own bookings. Preferring to give that task to the cost centre managers and Booking Administrators who can also verify the driver's licences.

## Functions of User Account Types

	Drivers	Booking Administrator	Key Keeper	Cost Centre Manager	Fleet Administrator
<b>Find a Lift</b>	Only if logon enabled	✓	✓	✓	✓
<b>Make bookings for themselves or edit or cancel it</b>	Only if logon enabled	✓	✓	✓	✓
<b>Book for others, or edit or cancel another's booking</b>		✓	✓	✓ (With-in own Cost Centres)	✓
<b>Add new users</b>		✓		✓	✓
<b>Enable users to logon</b>		✓			✓
<b>View Drivers License Details</b>		✓	✓	✓	✓
<b>Edit Drivers License Details</b>		✓	✓	✓	✓
<b>View Running Sheet</b>			✓		✓
<b>View own Cost Centre Reports</b>				✓	✓
<b>View all Reports</b>					✓
<b>Change Tariff and cost lists</b>					✓
<b>Change user privileges</b>					✓
<b>Change system wide lists</b>					✓
<b>Add /edit vehicles in fleet</b>					✓



# Users

Users are the people who use or are affected by the system of Open Fleet. That is they are the people that use the vehicles, or the people that administer the Open Fleet Software Package.

Before anyone can use Open Fleet, or have a vehicle booked for them, they will need to be entered into Open Fleet using the Users Screen.

Only Fleet Administrators, Cost Centre Managers and Booking Administrators can add new users.

**User Details:**

Given: Jay  
Surname: Burleigh  
Email: Jay.Smith@ITGuaranteed.com.au  
Phone: 0363263073 Mobile: 0419335310  
Default Pool: Newnham  
Cost Centre: Education  
Ledger: OP Project: 123456

☒ **Authorised to Drive Vehicle**

Driver Details:  
License: \*\*\*\*\*  
License Expiry: 29/07/2012  
Classes:   
Allocated Vehicle:

☒ **Enable Logon**


Logon Privileges:  
Username: jay  
☐ KeyKeeper  
☐ Booking Administrator  
☐ Cost Centre Manager   
☐ Financial Controller  
☒ Administrator  
☐ Inactive

**Vehicle Bookings:**

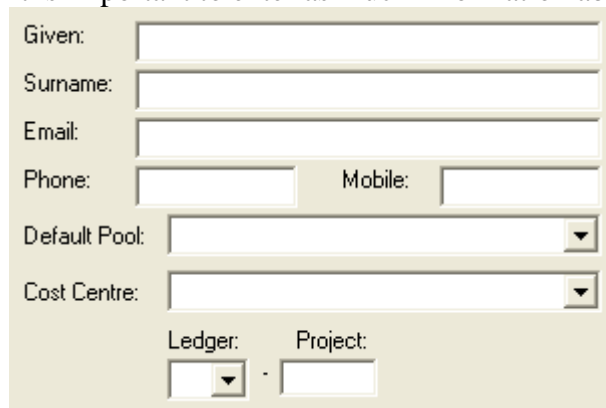
DateFrom	TimeFrom	DateTo	TimeTo	Destination	Vehicle Desc
17/08/2012	9:00:00 AM	17/08/2012	5:00:00 PM	Hobart Area School	B97WM Silver Mazda Classic
10/08/2012	9:00:00 AM	10/08/2012	5:00:00 PM	Hobart Area School	B97WM Silver Mazda Classic
3/08/2012	9:00:00 AM	3/08/2012	5:00:00 PM	Hobart Area School	B97WM Silver Mazda Classic
28/07/2012		28/07/2012		Launceston	(Passenger)
28/07/2012		28/07/2012		Sisters Creek	(Passenger)
27/07/2012		27/07/2012		Hobart Area School	(Passenger)
25/07/2012	9:00:00 AM	25/07/2012	5:00:00 PM	Hobart	B522R Silver Mazda Classic
25/07/2012	9:00:00 AM	25/07/2012	5:00:00 PM	Hobart	B412J White VOLKSWAGEN Transporter
25/07/2012	9:00:00 AM	25/07/2012	5:00:00 PM	Hobart Area School	C75DX Blue MITSUBISHI LANCER
24/07/2012	9:00:00 AM	24/07/2012	5:00:00 PM	Hobart	B522R Silver Mazda Classic
24/07/2012	9:00:00 AM	24/07/2012	5:00:00 PM	Hobart	B97WM Silver Mazda Classic
21/07/2012	9:00:00 AM	21/07/2012	5:00:00 PM	N W Centre	B522R Silver Mazda Classic
21/07/2012	9:00:00 AM	21/07/2012	5:00:00 PM	N W Centre	C07EA Silver Mazda Classic
21/07/2012	9:00:00 AM	21/07/2012	5:00:00 PM	Sandford	B97WM Silver Mazda Classic
20/07/2012	5:00:00 PM	20/07/2012	7:00:00 PM	Sisters Creek	WT2517 Silver Trailer Trailer
20/07/2012	1:00:00 PM	20/07/2012	5:00:00 PM	lower sandy bay	C07EA Silver Mazda Classic
19/07/2012	10:00:00 AM	19/07/2012	5:00:00 PM	Launceston	C07EA Silver Mazda Classic
18/07/2012	9:00:00 AM	18/07/2012	5:00:00 PM	Hobart	C07EA Silver Mazda Classic
1/06/2012		1/06/2012		Hobart	(Passenger)
1/06/2012		1/06/2012		Launceston	(Passenger)
1/06/2012		1/06/2012		Burnie	(Passenger)
1/06/2012		1/06/2012		Launceston	(Passenger)
31/05/2012		31/05/2012		Burnie	(Passenger)
28/05/2012		28/05/2012		Hobart	(Passenger)
25/07/2011		25/07/2011		Hobart	(Passenger)
25/07/2011		25/07/2011		Launceston	(Passenger)
22/07/2011		22/07/2011		Launceston	(Passenger)
20/07/2011		20/07/2011		Launceston	(Passenger)
20/07/2011		20/07/2011		Hobart	(Passenger)
19/07/2011		19/07/2011		Cradle Coast Campu	(Passenger)
19/07/2011		19/07/2011		Launceston	(Passenger)
19/07/2011		19/07/2011		Cradle Coast Campu	(Passenger)
13/07/2011	9:00:00 AM	13/07/2011	5:00:00 PM	Hobart	B97WM Silver Mazda Classic
12/07/2011		12/07/2011		Launceston	(Passenger)

The Administrators View: Configuring a Users Account.

## To add a New User

- Click the  **New User** button on the toolbar  
or  
Choose **File, New User** From the Menu Bar

- 2 It is important to enter as much information about each user as is possible.

A form for user registration with the following fields: Given (text), Surname (text), Email (text), Phone (text), Mobile (text), Default Pool (dropdown), Cost Centre (dropdown), Ledger (dropdown), and Project (text).

Given:   
Surname:   
Email:   
Phone:  Mobile:   
Default Pool:   
Cost Centre:   
Ledger:  Project:

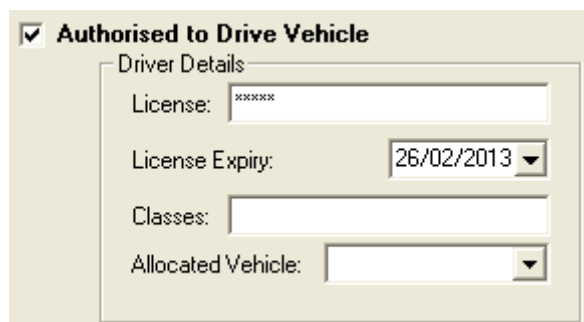
**Email addresses** are used to email the user in cases of changes to their bookings such as automatically by the system when passengers are added to or cancelled from their bookings.

**Mobile Phone** numbers are import for contacting the driver when they are on the road in cases of emergency or late return.

**Default Pool** is the vehicle pool that vehicles are selected from for the user's bookings.

**Cost Centre, Ledger & Project codes** are all set as default for the user so that when the user makes a booking these are used. Each booking may have its settings changed after these defaults appear. Defaults are used to save time when making bookings.

- 3 If the user is to drive a vehicle and the appropriate licence has been sited according to your organisations policies and your states governing laws, then check the **Authorised to Drive Vehicle** box.

A form titled 'Authorised to Drive Vehicle' with a checked checkbox. It contains a 'Driver Details' section with the following fields: License (text), License Expiry (dropdown), Classes (text), and Allocated Vehicle (dropdown).

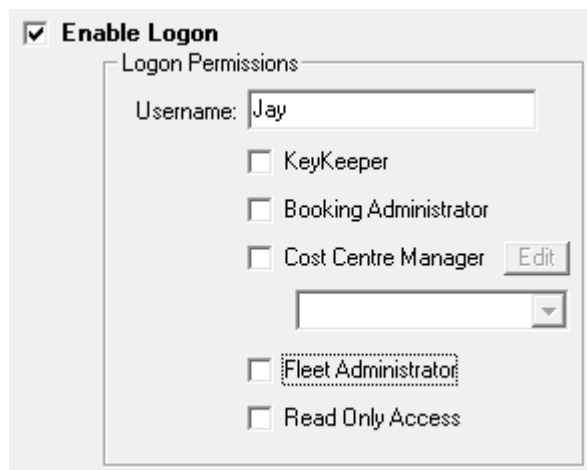
☒ **Authorised to Drive Vehicle**  
Driver Details  
License:   
License Expiry:   
Classes:   
Allocated Vehicle:

The amount of information to be entered here will depend upon your organisations policy for driving company vehicles.

If the user has additional classes of vehicles on their license it may be noted in the **Classes** box.

If the user has a vehicle that is permanently allocated to them but that vehicle is also allocated to a pool during business hours, then select that vehicle in the **Allocated Vehicle** dropdown. Any time this user searches for a vehicle to book, this vehicle will be examined for availability first.

- 4 If the user is permitted to be logged onto the system check the **Enable Logon** box.



If enable Logon is checked then a username **MUST** be entered. This should be the name that the user uses to log into windows.

Set the user account type/s as required.

## Permissions: Who can set User Account Types

**Fleet Administrators** are the only account types can assign account types.

**Booking Administrators** can allow other users to log on.

**Cost Centre Managers** may only create new users but not enable them to logon.

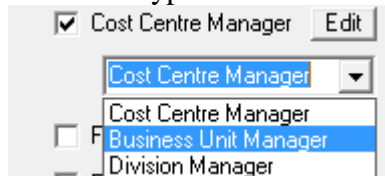
## Allocating Cost Centres to a Cost Centre Manager

To assign one or more cost centres to a cost centre manager

- 1 Ensure the **Cost Centre Manager** permission is ticked



- 2 Select the type or Cost Centre Manager



- 3 Click **Edit** button.

- 4 Select each cost centre, business unit, or division that the Manager is responsible for. Depending on the selection in step 2, you may select either Cost Centres, Business Units or Divisions.

The image shows three separate windows for selecting organizational units:

- Select Cost Centres:** A list of various community nursing and care services. 'N74443 Community Dementia Service' and 'N78133 Community Palliative Care North' are selected.
- Select Business Units:** A list of administrative and support services. 'CHAPS' is selected.
- Select Divisions:** A list of regional and specialized services. '[empty]' is selected.

## Read Only

Read only is a special add on restriction to an account type. It makes whatever account type/s have been selected only available in a read only mode.

This is suitable for **auditors** who may need to examine everything in Open Fleet, but should not be able to change anything.

## Deleting Users

It is not good practice to delete a user as their past bookings will then be unallocated. Instead just mark the user as **inactive**.

If it is a new driver made in error with no bookings **ever** then just use this driver for the next driver that you need to make and type over all fields.

## Username and passwords

Open Fleet uses **Single Sign on** which occurs behind the scenes, unknown to the user. Users will not have to remember yet another username and password combination. Rather, upon entry the program utilises the authentication that has already occurred when the user logged into windows. All bookings made by the user are made under the username of the logged on user. With this system there is **No extra username or password for users to have to remember.**

# Smart Booking

**Smart Booking** utilises best practice booking techniques to maximise the use of the vehicles, maximise the availability of vehicles and at the same time can be used to minimise the size of the vehicle fleet. Smart Booking takes the task of selecting which vehicle away from the driver, and puts it back in the hands of the fleet manager. Open Fleet is designed to keep the longest free space available for each vehicle, and by doing so ensuring that the other vehicles are more fully booked. Bookings may still be manually adjusted by either administrators or key keepers. Other methods of allocating vehicles were considered. Booking the vehicle with the lowest odometer reading might only book the newest vehicle. Booking the vehicle with the lowest rate of klm/months owned may average out the fleet's usage but it doesn't let the fleet's use be maximised to the extent of smart booking.

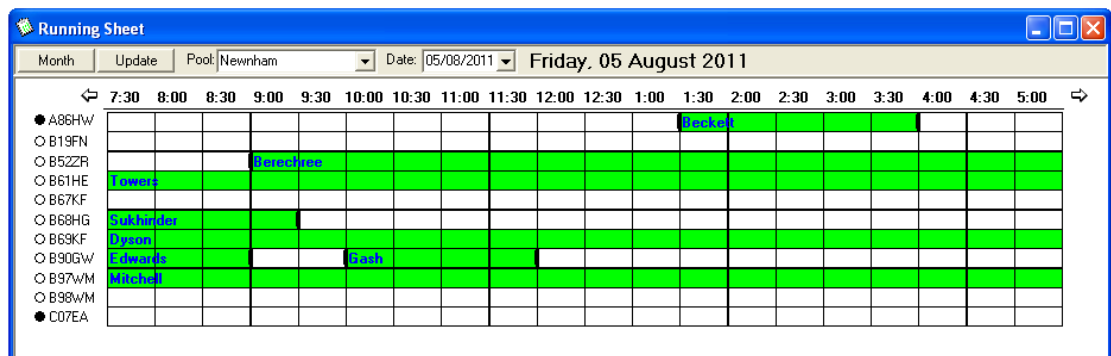
## Sample Booking

This sample booking demonstrates how Smart Booking maximises the pools availability.

In the sample on the following page, a user requires a vehicle from 12:00pm to 1:00pm.

The running sheet shows that there are 11 vehicles in the pool but 4 are already booked, leaving 7 available.

This booking could have been made taking any of the 7 cars that were available. Had users been able to choose which vehicle they wanted, they could have blocked out another car from being used for a longer time span, such as a full day booking.



Before making a 12:00pm to 1:00pm booking in the Newnham Pool

**New Booking**

From: 05/08/2011 12:00 PM To: 05/08/2011 1:00 PM

Driver: Burleigh, David Pool: Newnham

Recurrence: ☒ No Repeat ☐ Daily ☐ Weekly ☐ Monthly

Change Dates and Times

Make Booking

Vehicle: Registration: B90GW, White HOLDEN Cruze

Destination: [Enter Destination or part of, eg. hob]

Cost Centre: Centre for Advancement L&T Ledger: OP Project: 055277

Purpose: [Reason for Journey]

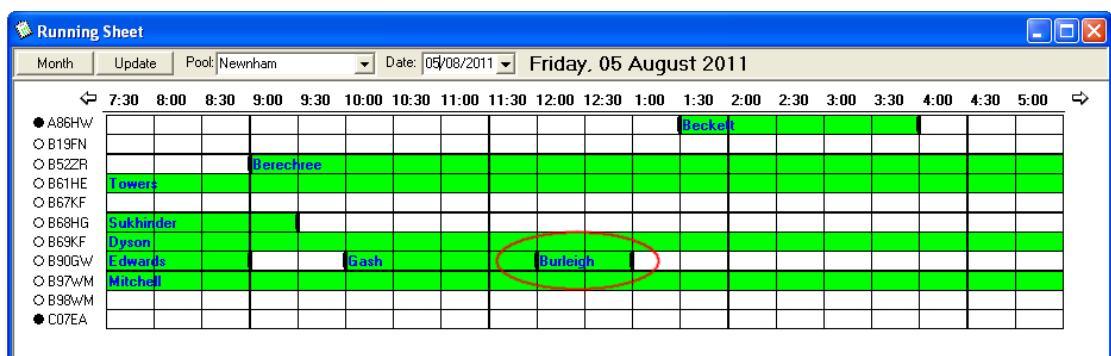
Requisition No: [ ]

☐ I certify the above named driver holds a current licence to drive this motor vehicle

Save

Buttons: Abort, Cancel Booking, Passengers / Co-Drivers, Email Booking to Driver, Add this to my Calendar, Print Booking Slip, Show Fees & History

Making the Booking: The program automatically selects the vehicle



With the booking made making the least impact on future possible bookings

## Vehicle Pools

Having pools of vehicles is integral to Smart Booking ideology.

**Pools** are vehicles that are similar, such as 4 cylinder sedans, **and** located in the same geographical area. That is walking distance to pickup from each other.

Some pools would be required to be standalone pools such as a Minibus pool, which may only contain one vehicle.

The larger the pool, the better smart booking can operate. If there were many small pools of vehicles which were only grouped by, for example departmental differences, smart booking technology would operate in a greatly reduced capacity. For example



**I.T. Pool**

**Finance Pool**

--	--	--	--	--	--	--

**Requested Booking**

Suppose there are two pools of vehicles, the I.T pool, and the Finance pool.

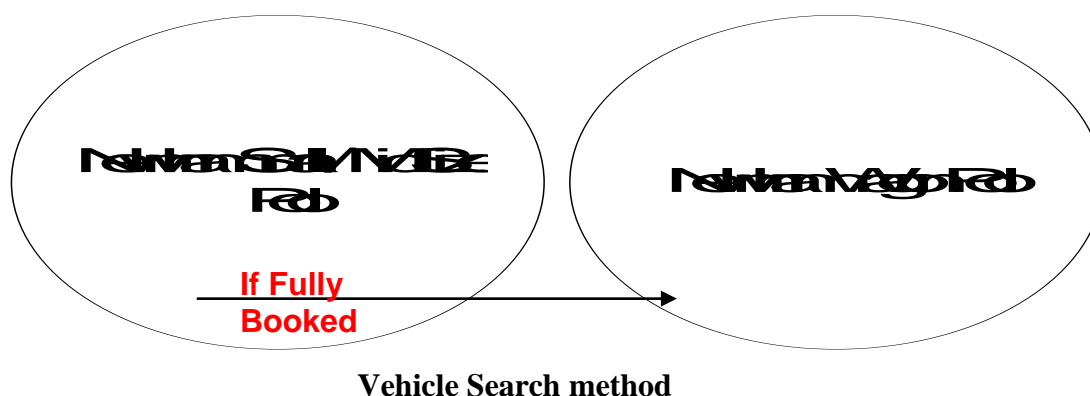
Now suppose the I.T. pool has a gap of two hours one day with no bookings, but someone who works in Finance requires a booking that fits somewhere in that two hour span. What would happen in this example is that the user would be allocated a vehicle from the Finance pool effectively stopping some one from booking a car all day in that pool.

If the two pools were actually one larger pool then a Vehicle could be saved.


**Combined Pool**

**Note: Special use cars**, can be accommodated into this system by putting them in a separate pool. For example there may be a pool of sedans at Newnham called Newnham Pool, there may also be a Sandy Bay Pool, Cradle Coast Pool, but there could also be a Newnham wagon pool, Sandy Bay wagon pool and a Cradle Coast wagon pool. There may even be a Newnham minibus pool even though there is only 1 vehicle in the pool.

Pools are the method used to break up cars into the type of vehicle (either standard or a separate pool for each speciality of vehicle) and place of pickup/return of vehicle. In this way a user of the system may select a special needs vehicle from the location nearest to them, without the need for manual assignment by a human fleet controller while still conforming to the **smart booking** ideology. These pools are only separate on the system, they don't need to be physically separate, eg in a separate car park.



When booking a vehicle, the user only needs to select the Pool they desire to search. For example if the user wants a small or mid size vehicle at the Newnham Campus, then they only need select Newnham Small / Mid Size pool and click “Find Vehicle” and the software will search all of the vehicles in this pool at Newnham. If there are no vehicles available in the small / mid size pool the software will ask the user if they wish to search the wagon pool (configured by the Administrators)

In this way users are prevented from taking a special purpose vehicle (wagon, minibus) unless all other vehicles are unavailable.

Of course if the user desired a wagon then they could search the Newnham wagon pool first, by selecting that pool in the pool chooser dropdown list.

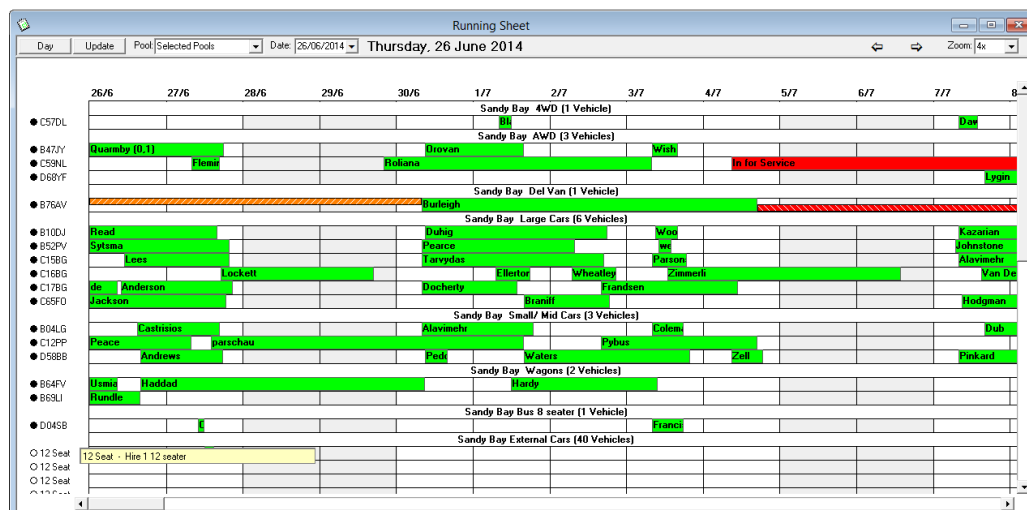
## Allocating Vehicles into Pools

Vehicles may be allocated into pools either in the **vehicle screen** or quickly using the **Vehicles and Pools, Quicklist** in the **Lists Menu**

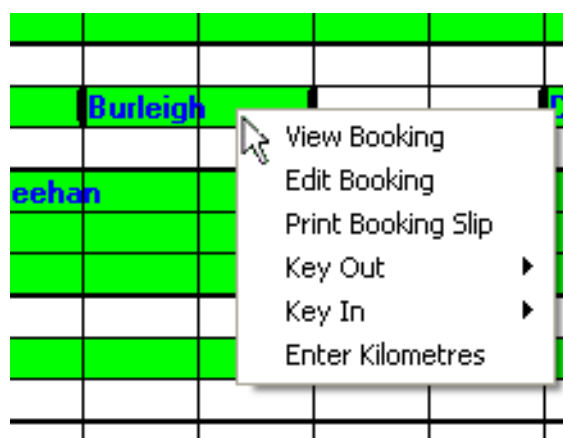


# Running Sheet

Administrators and Key Keepers have can do more things on the running sheet than other users, if they are even granted permission to access it.



Bookings may be dragged from one vehicle to another, with an email confirmation able to be sent notifying the driver of the change.



**Right Click Menu**

Right Clicking on a booking brings up a menu from which users may select a number of choices.

## Key in / Key Out

Open Fleet can record the times that the keys were actually collected and returned. These can affect the hire fees charged for the vehicle booking.

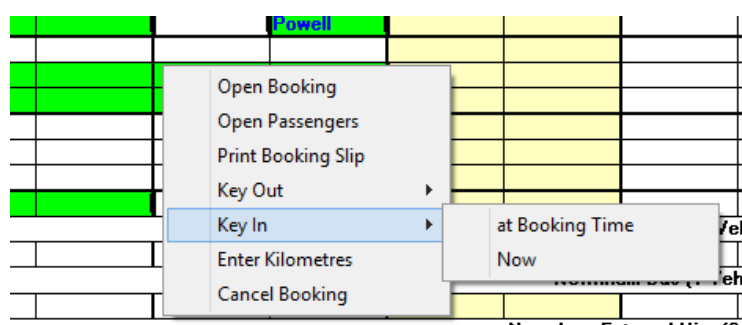
Keying in or out a vehicle also is an aid to knowing what vehicles are immediately available in the pool.



Thin orange bar indicates the booking was keyed out early, while a thin red bar indicates a late return.

To key out a booking,

- ① Right click on the booking.



Select **Key Out** then slide the pointer to the appropriate time choice.

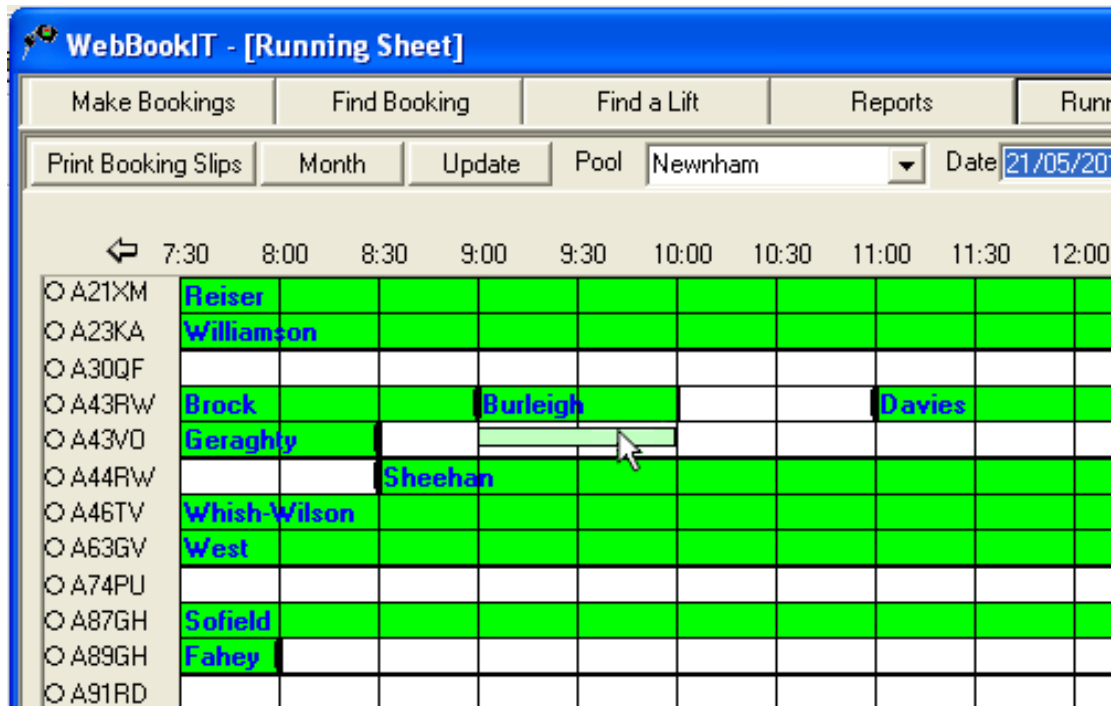
To key in a booking,

- ① Right click on the booking.
- ② Select **Key In** then slide the pointer to the appropriate time choice.
- ③ If the administrator has set Open Fleet to request the kilometres at key in then the system will display the **Enter Kilometres** dialog.

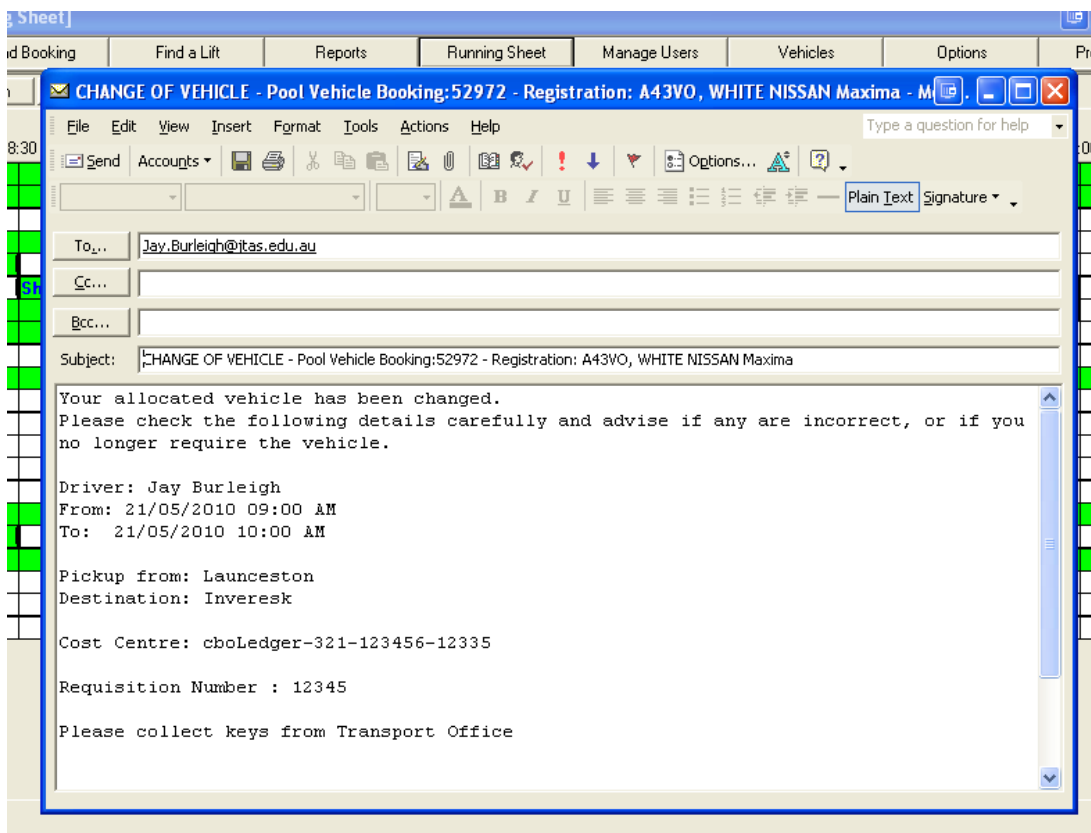
## Late Return Email Message

When a booking is keyed in late the operator will be asked if they wish to send a late return email message. The prefilled message, created from a template in Options, Message Wording, opens on the operators screen ready to be edited, or sent.

## Switching Vehicles



- 1 To move a booking simply drag it to another vehicle.



- 2 Upon release of the mouse button the computer will ask if the driver should be sent an **Email confirmation** to notify them of the change.

# Pool Booking Slip

**Pool Booking Slip** Booking No: 55178

**Validate License** <sup>1</sup>

Colour: Red	Make / Model: TOYOTA AURION	Registration No: A86HW
Driver's Name: Jacqueline Clear	Date booked from: 28/10/2010	Date booked to: 28/10/2010
Requisition no: 28622	Time from: 8:30:00 AM	Time to: 5:30:00 PM
Start from:	Destination: Launceston	Cost Centre No: 721 - Cradle Coast Campus

**Please Note: The fuel tank should be at least half full upon return.**

B.P. Fuel Card PIN 1234

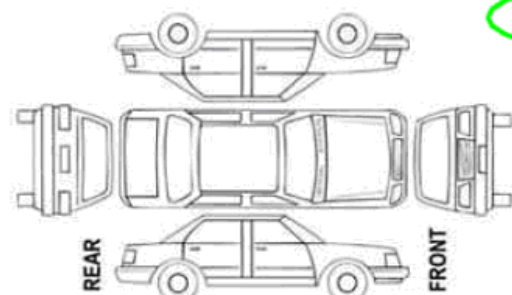
Shell Fuel Card PIN 1111

<sup>2</sup>

## Change of Driver Details:

The driver is responsible for any infringement notices - Speed Camera - Parking - etc.

Date _____	Time _____	am pm	Driver _____
Date _____	Time _____	am pm	Driver _____
Date _____	Time _____	am pm	Driver _____



If vehicle is damaged please mark damage on diagram

Long Scratch on drivers side door

<sup>3</sup>

☐ Please tick box if First Aid Kit was used

☐ Please tick box if Fire Extinguisher was used

Motor Vehicle Insurance Claim Excess: From 1 January,2008 a \$1000 excess on Motor Vehicle claims will apply.

## Odometer Reading

Start \_\_\_\_\_ Finish \_\_\_\_\_ Time Returned: \_\_\_\_\_

Purpose of Journey: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_  
Driver's Signature

Vehicles are booked back to back so if you become aware that you will return the vehicle past the due time call 6xxx xxxx ASAP.

<sup>4</sup>

1	If the text <b>Validate License</b> appears here then the key keeper or administrator should perform a visual check of the driver's licence. They should also update the license expiry date in the <b>Manage Users</b> screen.
2	<b>Fuel Card</b> information from the <b>Vehicle</b> screen
3	<b>Existing Damage</b> information from the <b>Vehicle</b> Screen
4	<b>Pool Booking Slip message</b> from the <b>Pools</b> menu choice in the list menu

## Reports

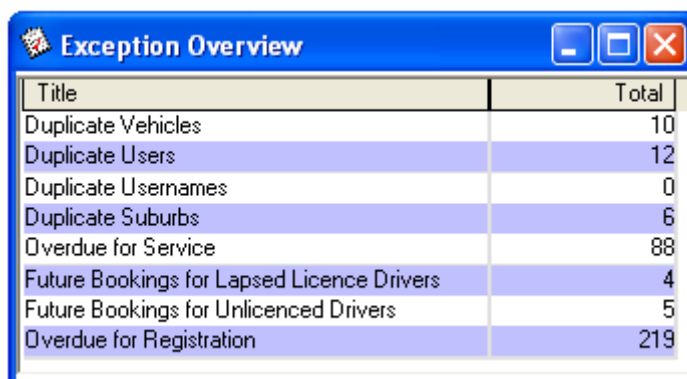
Open Fleet has a plethora of reports available.

All reports are drillable. That means that each line of a report can be double clicked on and Open Fleet will either zoom to a sub report, or open the booking, or the transaction, or the user, as the case may be.

Reports are divided into subject groups. Report groups are:

Bookings	These include reports My Bookings, which user has access to; Bookings; and Booking Slips
Financial	Cost Centre Transactions; General Journal (for export); and Vehicle Costs reports
Vehicles	All manner of reports about vehicles for example, Disposal reports, On Order Reports, Purchased reports, and an asset list just to name a few
Users	Informative reports about Open Fleet users, such as Drivers with Expired Licenses, Unlicensed Drivers, and an advanced users report to keep track of who has elevated privileges.
Utilisation	Reports to monitor the pools utilisation.
Performance	A KPI report to give a one page overview of the performance of the fleet; and a number of Top 10 reports for example, Top 10 Drivers by Cost, Top 10 Cost Centres by Cost, or even Top 10 Late returners which could be used to send follow up letters,.
Exceptions	A host of reports with an overview report to monitor possible problems.

## Sample Reports



Title	Total
Duplicate Vehicles	10
Duplicate Users	12
Duplicate Usernames	0
Duplicate Suburbs	6
Overdue for Service	88
Future Bookings for Lapsed Licence Drivers	4
Future Bookings for Unlicensed Drivers	5
Overdue for Registration	219

**Exception Overview Report showing a number of problems that require resolution.**

LEAD

Top 10 Drivers by \$

X

## Drivers by \$

### All Time

Rank	Driver	Total \$
1	James Holmes	1002125
2	John Andrews	54395
3	Stephen Jabour	42130
4	Robert Maxwell-Stewart	35655
5	Neill Ashman	35564
6	Clair Ricks	32699
7	Bernie Seaborn	32066
8	Ian Verth	30926
9	Wendy Tonks	29335
10	Greg Rogers	27998

### This Month

Rank	Driver	Total \$
1	Jay Burleigh	1918
2	Donna Lee	375
3	Colin Ellings-Walsh	375
4	Sophie Barnett	125
5	Andrew Muskett	125
6	Carrie Gill	125
7	Simm	125
8	Barry Gracie	125
9	Susan Godfrey	120
10	Thi Khin	

### Last Month

Rank	Driver	Total \$
1	Cecily Roehrer	500
2	Michael Johnson	500
3	Peter Dyson	378
4	Donna Lee	375
5	Tony Crawford	298
6	Diana Murray	250
7	Wendy Tonks	250
8	Sara Scott	250
9	Gemma Kenny	245
10	Jason McGinn	209

### This Year

Rank	Driver	Total \$
1	Greg Rogers	27998
2	Cecily Roehrer	10846
3	Bernie Seaborn	7527
4	Terry Cripps	6990
5	Andrew Smith	6399
6	Stephen Jabour	4500
7	Rob Bell	3984
8	Wendy Tonks	3764
9	Repair Allan	3483
10	Gemma Kenny	3440

### Last Year

Rank	Driver	Total \$
1	Bernie Seaborn	16305
2	Stephen Jabour	13551
3	John Andrews	13209
4	Robert Maxwell-Stewart	12066
5	Daniel Dal Pont	11125
6	Terry Cripps	9871
7	Cecily Roehrer	9687
8	Jeannie- Marie Hayes	8499
9	Clair Ricks	8331
10	Peter McCormack	8250

Top 10 Drivers by \$ Report showing the Drivers that have paid the most .

Cost Centre Transactions											
Dates		Last Month		From 01/06/2012		To 30/06/2012		Go			
Cost Centre:		All Cost Centres									
Project	From	To	Suburb	Driver - Purpose	Time out	Klms	Hire Fee	Extra Km Fee	Late Fee	Booking	Charged
School of Management											
23004	31/05/2012 12:00	01/06/2012 17:00	Burnie	Gemma Kenny -	29 hrs		\$245.00	\$0.00	\$0.00	\$245.00	\$102.08
											\$102.08
School of Medicine											
32883	05/06/2012 08:30	05/06/2012 13:00	Local	Toby Ghosh -	4 hrs		\$160.00	\$0.00	\$0.00	\$160.00	\$160.00
											\$160.00
School of Chemistry											
41832	18/06/2012 08:00	18/06/2012 18:00	Ross	Jason McGinn -	10 hrs		\$209.00	\$0.00	\$0.00	\$209.00	\$209.00
41832	18/06/2012 08:00	18/06/2012 18:00	Ross	Greg English -	10 hrs		\$125.00	\$0.00	\$0.00	\$125.00	\$125.00
											\$334.00
Menzies Centre											
101286	06/06/2012 09:00	07/06/2012 18:00	Burnie	Diana Murray -	33 hrs		\$250.00	\$0.00	\$0.00	\$250.00	\$250.00
											\$250.00
Cradle Coast Campus											
53239	31/05/2012 18:00	02/06/2012 18:00	Hobart	Tony Crawford -	50 hrs		\$298.00	\$0.00	\$0.00	\$298.00	\$298.00
55277	12/06/2012 08:00	15/06/2012 18:00	Launceston/Hobart	Michael Johnson - Staff	82 hrs		\$500.00	\$0.00	\$0.00	\$500.00	\$500.00
											\$798.00
Academic Registrars Office											
123456	01/06/2012	01/06/2012	Launceston	Jay Burleigh (Passenger) -							\$30.00
123456	01/06/2012	01/06/2012	Launceston	Jay Burleigh (Passenger) -							\$40.83
123456	01/06/2012	01/06/2012	Burnie	Jay Burleigh (Passenger) -							\$30.00
123456	01/06/2012	01/06/2012	Hobart	Jay Burleigh (Passenger) -							\$125.00
50218	04/06/2012 07:30	05/06/2012 17:30	Launceston	Sara Scott -	34 hrs		\$250.00	\$0.00	\$0.00	\$250.00	\$187.50
51406	06/06/2012 08:00	08/06/2012 19:00	Launceston	Donna Lee -	59 hrs		\$375.00	\$0.00	\$0.00	\$375.00	\$375.00
50218	27/06/2012 14:00	27/06/2012 23:00	Burnie	Julie Connor -	9 hrs		\$125.00	\$0.00	\$0.00	\$125.00	\$125.00
											\$913.33
Academic Services											
50410	28/05/2012 14:00	01/06/2012 14:00	Hobart	Cecily Roehrer - Hire of	96 hrs		\$500.00	\$0.00	\$0.00	\$500.00	\$250.00
											\$250.00
Vehicle Fleet											
59002	01/06/2012	01/06/2012	Launceston	Bruce Webster (Passenger)							\$40.83
											\$40.83
Grand Total											\$3,725.24

The Cost Centre Transactions report showing the bookings broken into cost centre groups with totals.

Error! Hyperlink reference not valid.

## Region Filter

Some organisations are so large that they have a fleet administrator in each region. In this case these organisations require each fleet administrator to

manage only the vehicles in their region, but someone else may need to report on the entire organisation.

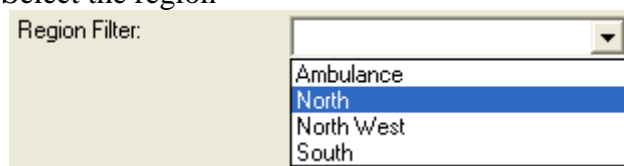
To cater for this need Open Fleet has introduced Region Filters. When activated reports will only show the vehicles that are in the selected region.

## To set up regions

- 1 From the menu bar select **Lists, Regions**.
- 2 Enter in the name of each region in your organisation, eg North, South, East, West, etc.

## To activate or select a region

- 1 From the menu bar select **Tools, My Preferences**.
- 2 Select the region



- 3 Click **OK** to save the selection.  
Now when vehicle reports are accessed only the vehicles in the corresponding regions will be displayed. Other kinds of reports such as Bookings reports or Performance reports are unaffected.

## To de-activate region selection

- 1 From the menu bar select **Tools, My Preferences**.
- 2 Delete or clear the selected region
- 3 Click **OK** to save the selection.

## Utilisation Reports

Utilisation reports are a benchmarking tool for determining how well your organisation is utilising its fleet.

The idea of a utilisation report is not to run it once, and boast or bemoan the result. The idea is to run the report regularly and to compare the different results. These reports should be used, together with other reports, to determine the future size of your organisation's fleet.

They can be used to determine peak periods and down times.

## Vehicle Utilisation by Earnings

This report is more of an indicator for utilisation than a true utilisation report. It gives a good measure of actual income from vehicles, measured against available income.

This report does not report on disposed vehicles, so it cannot be used to examine historical data.



## Vehicle Utilisation by Hours used per day

This is a true indicator report.

It reports on the number of hours a vehicle was booked for as a percentage of its total available hours.

A blank value indicates the vehicle was either not yet purchased, or was disposed of for that month.

A row of zeros, apart from indicating that the vehicle was not used, shows a possibility that the vehicle may not have a date of disposal entered.

Crucial to the proper operation of this report is the completion of the fields in the vehicle window: **Date of Purchase**, **Date of Disposal**, **Disposed**.

## Vehicles Due for Service Report

The Due for Service report provides the expected dates that a vehicle will become due for service. It calculates this from:

- ④ the average kilometres per day that the vehicle travels (**Odometer** divided by days owned {Today's date - **Date of Purchase** }),
  - the **last service date**,
  - the **odometer** reading at the last service and
  - the **service schedule**.

Where bold items are fields on the vehicle screen.

The screenshot shows a vehicle record form. At the top, there are fields for Registration No (IG55363), Body Type (Wagon), Non-Vehicle (checkbox), and Keys Back (checkbox). Below these are Odometer (23343) and Tariff. A 'Save' button and an 'Add New Expense' button are on the right. The 'Specs' section includes Fuel Type (Unleaded Petrol), Transmission (Automatic), Premium Class (1 Motor Car), Hybrid (checkbox), Engine No (426645B), Service Schedule (6/1500/10000), Last Service KLM (20543), Last Service Date (09/05/2013), Manufacture Date (01/04/2102), and Warranty Inspection Plan.

a

in vehicles do not require servicing such as fuel cards, or trailers. To exclude these vehicles from the Due for Service report set the **Service Schedule** on the vehicle screen to **Never**

## Vehicles Due for Warranty Inspection

Some manufacturers require that their vehicles be checked after a certain period of time or kilometres as part of the vehicles warranty.

If a vehicle does require a warranty inspection then select it from the list of Warranty Inspection Plans on the vehicle Screen.

### To mark that a vehicle has had its warranty inspection:

- ① Open the vehicle record
- ② Click the Add new Expense Button.
- ③ In the **Expense Type** box, select **Warranty Inspection**
- ④ Enter any other details that you wish such as odometer.

- 5 Click **Save** when finished.  
The vehicle will no longer show on the Vehicles Due for Warranty Inspection Report.

### Vehicles on Order Report

This report lists vehicles that have been ordered but are yet to arrive.

It calculates this by from the **Date of Purchase** field in the vehicle screen. If the date of purchase is blank then the vehicle will appear in this report.

### Vehicles Disposed Report

This report lists vehicles that have been disposed within the selected time period.

It calculates this by from the **Disposed** field and the **Date Disposed** field in the vehicle screen. If the **Date Disposed** is blank then the vehicle will not appear in this report.

### Vehicles Purchased Report

This report lists vehicles that have been purchased within the selected time period.

It calculates this by from **Date of Purchase** field in the vehicle screen. If the **Date of Purchase** is blank then the vehicle will not appear in this report.

### Vehicles Due for Replacement Dates Report

This report lists vehicles that are due to be replaced and when they are due for replacement.

It calculates this by from:

- the **Due for Replacement Date**
- the **Due for Replacement Kms**
- the average kilometres per day that the vehicle travels (**Odometer** divided by days owned {Today's date - **Date of Purchase**}),

where bold items are fields on the vehicle screen.

Non-Vehicles will be excluded from this report unless they have a value in either the **Due for Replacement Date** or the **Due for Replacement Kms**

### Vehicles Average Daily Klms Report

This report lists the vehicles average daily kilometres travelled.

It calculates this by from:

- (**Odometer** divided by days owned {Today's date - **Date of Purchase** } ),

where bold items are fields on the vehicle screen.

Vehicles without a **Date of Purchase, Odometer, and Non-Vehicles** are excluded from this report.

# Vehicle Window

Open Fleet - [C47KH MITSUBISHI PAJERO]

File Edit Lists Reports Graphs Tools Recent Window Help

Find:


New Booking Find a Lift Running Sheet

Specs	Usage	Purchasing	Disposal	Fitted Options	Comments	Expenses
Vehicle ID No: <input type="text" value="NRT046"/> Registration No: <input type="text" value="C47KH"/> Odometer: <input type="text" value="28403"/>	Model: <input type="text" value="MITSUBISHI PAJERO"/> Body Type: <input type="text" value="Wagon"/> Tariff: <input type="text"/>	Colour: <input type="text" value="GOLD"/> Non-Vehicle: <input type="checkbox"/> Keys Back: <input type="checkbox"/>	<input type="button" value="Close"/> <input type="button" value="Save"/> <input type="button" value="Add New Expense"/>			
<b>Specs</b>						
Fuel Type: <input type="text" value="Diesel"/> Hybrid: <input type="checkbox"/> Engine No: <input type="text" value="4M41UAG0423"/> VIN: <input type="text" value="JMFLNV98WCJ000271"/> Tyre Size: <input type="text"/> Engine Size: <input type="text" value="3.2"/>	Transmission: <input type="text" value="Manual"/> Service Schedule: <input type="text" value="12/15000"/> Manufacture Date: <input type="text" value="01/09/2011"/> Radio PIN: <input type="text"/> Security Gate No: <input type="text"/> G.P.S. Serial No: <input type="text"/>	Premium Class: <input type="text" value="1 Motor Car"/> Last Service KLM: <input type="text" value="19619"/> Last Service Date: <input type="text" value="12/02/2013"/> Warranty Inspection Plan: <input type="text"/> Registration Expiry: <input type="text"/> GreenGuide: <input type="text" value="8.5"/> CO2 Emissions: <input type="text" value="221"/>				
<b>Usage</b>						
Usage: <input type="text" value="Salary"/> Exclude from Utilisation Reports: <input type="checkbox"/> Pool: <input type="text" value="MDSES"/> Region: <input type="text" value="North"/>	Current Driver: <input type="text" value="Jay Burleigh"/> <a href="mailto:Jay@ITGuaranteed.com.au">Jay@ITGuaranteed.com.au</a> Home Garaged: <input checked="" type="checkbox"/> Reason: <input type="text" value="Contract"/>	Contact Person: <input type="text" value="Burleigh, Jay"/> <a href="mailto:Jay@ITGuaranteed.com.au">Jay@ITGuaranteed.com.au</a> Location: <input type="text" value="HOME ADDRESS"/> Suburb: <input type="text" value="LAUNCESTON"/>				
Cost Centre: <input type="text" value="N74443 Community Dementia Service"/> Ledger: <input type="text" value="610"/> Project: <input type="text" value="0000"/> Business Unit: <input type="text" value="Primary Health North"/> Division: <input type="text" value="THO North"/>						
Fuel Card #1: <input type="text" value="BP"/> Fuel Card #2: <input type="text"/>	Card Number: <input type="text"/> Card Number: <input type="text"/>	Fuel Card #1 PIN: <input type="text"/> Fuel Card #2 PIN: <input type="text"/>				
<b>Purchasing</b>						
Date Ordered: <input type="text" value="08/08/2011"/> Requisition No: <input type="text" value="HN12046"/> Order No: <input type="text" value="100047582"/> Order Price: <input type="text" value="\$0.00"/> Purchase Price: <input type="text" value="\$51,259.00"/> Tax: <input type="text" value="\$0.00"/> Lease Price: <input type="text" value="\$472.74"/> Term (months): <input type="text" value="36"/>	Asset No: <input type="text" value="10054761"/> Invoice No: <input type="text"/> Start KLMs: <input type="text"/> Replaces: <input type="text" value="B834F"/> Supplier: <input type="text" value="Lion Mitsubishi"/> Funded By: <input type="text"/>	Date First Registered: <input type="text"/> Expected Delivery Date: <input type="text"/> Date of Purchase: <input type="text" value="30/11/2011"/> Due for Replacement Date: <input type="text" value="30/11/2014"/> Due for Replacement KMs: <input type="text" value="60,000"/>				
Purchase Method: <input checked="" type="radio"/> Leased <input type="radio"/> Purchased						
<b>Disposal</b>						
Disposed: <input type="checkbox"/> Date Disposed: <input type="text"/> Sale Item No: <input type="text"/>	Final Kms: <input type="text"/> Sold Price: <input type="text" value="\$0.00"/> Sold To: <input type="text"/>	Replaced by: <input type="text"/> Disposal Method: <input type="text"/> Credit Cost Centre: <input type="text"/>				
<b>Fitted Options</b>						
Air Conditioning: <input type="checkbox"/> Bull Bar: <input checked="" type="checkbox"/> 1st Aid Kit: <input type="checkbox"/> Tow bar: <input checked="" type="checkbox"/> Mat Set: <input checked="" type="checkbox"/>	Headlamp Protectors: <input type="checkbox"/> Bonnet Protectors: <input type="checkbox"/> Fire Extinguisher: <input type="checkbox"/> Lights and Sirens: <input type="checkbox"/> Reverse Park Sensor: <input type="checkbox"/>	Roof Cross Bars: <input type="checkbox"/> Winch: <input type="checkbox"/> DropSideTray: <input type="checkbox"/> Canopy: <input type="checkbox"/> Cruise Control: <input type="checkbox"/>	Two Way: <input type="checkbox"/> Phone: <input type="checkbox"/> Cargo Barrier: <input type="checkbox"/> ABS Brakes: <input type="checkbox"/>			
<b>Comments</b>						
Comments: <input type="text" value="Tow pack fitted after delivery"/>						
Pool Booking Slip Message: <input type="text"/>						
Existing Damage (Printed on Pool Booking Slip): <input type="text"/>						

The darker area of the usage section only displays the current driver information. To alter it the Driver History screen must be accessed.

## Add a new vehicle

To add a new vehicle to the fleet:

- ① Click the  **New Vehicle** Button on the Toolbar.
- ② Enter all the information you wish to about the vehicle.  
(If replacing an existing vehicle see **Replacing a vehicle** on Page 56 )

### Critical Vehicle Information

There are some critical fields that relate to the function of Open Fleet.

Registration	Identity for the vehicle
Model, Colour	Visual Identity for the driver
Tariff	For charging Hire Fees
Pool	Where does the vehicle live
Date Purchased	Required for utilisation reports otherwise Open Fleet Will not know when to start reporting on this vehicles Utilisation
Date Disposed	When the vehicle is disposed the date it is disposed is used by utilisation reports to stop reporting on this vehicles utilisation.
Service Schedule	This field indicates which service pattern (in the service list) applies to this vehicle.  It is used together with the <b>odometer</b> reading to calculate when the vehicle is due for service in the It is used together with the <b>odometer</b> reading in the <b>Due for Service</b> Report.
Usage	Usage can be either <b>General Pool:</b> Available for booking by anyone <b>Department:</b> Internal Department use only, may be pool <b>Salary:</b> A vehicle allocated to someone as part of a salary package
Odometer	Used in due for replacement & Due for Service Reports
Last Service KLM, Last Service Date	Used in Due for service Report
Registration Expiry	Used in Registration Expired Report.

If just the minimum data is to be entered then the form on page 55 can be used as a collection document.

## Other important fields

Home Garaged	Is the Vehicle housed off site during the night?
Comments	A place for anything not included above
Pool Booking Slip Message	This message will be printed on a booking slip whenever this vehicle is booked
Existing Damage	Enter details of known damage to vehicle. This reassures the driver that the organisation already knows about the damage. It also saves the same conversation with the driver every time the vehicle is returned.
Due for replacement Date	The date that the vehicle is due to be replaced. Usually the date of purchase plus X years. This field is used in the <b>Due for Replacement Report</b> .
Due for replacement klms	The Odometer reading for replacement of vehicle.  This field is used in the <b>Due for Replacement Report</b> . It is used together with the <b>odometer</b> reading to and the <b>Due for replacement Date</b> to calculate the expected date of change over.
Fuel Card & Fuel Card PINs	These fields are printed on the Pool Booking Slip.
Non-Vehicle	This is used to indicate if the asset is a fuel card, mower, boat or trailer. It will exclude the vehicle from certain reports.

If it is intended to enter more than the minimum, then print out a blank vehicle report for use as a data collection sheet.

- ① Click **File, New Vehicle** from the Menu Bar.
- ② Click **File, Print**.  
This will print out all the fields required, and can serve as a data collection form for each vehicle.
- ③ Close the form without saving.

## Minimum Data to collect

[illegible]

## Driver History and FBT

It is important to record not just the current driver of a vehicle but to keep a record on who were the past drivers. Fringe Benefits Tax requires this information particularly in the case of vehicles that are garaged at an employee's home address. The Driver History screen is used for this purpose.

Date From	Date To	Start Odo	Finish Odo	Driver	Home Garaged	Home Garaging Reason	Cost Centre
3/08/2013		9854	0	John Citizen	Yes	Contract	IT Resources
9/02/2012	2/08/2013	12	9854	Jay Burleigh	Yes	Contract	IT Resources

Driver History Screen showing a vehicle that has had two drivers.

### To Open the Driver History Screen,

- 1 Click the **Driver History Button** on the Vehicle Screen.



The darker area of the usage section on the vehicle screen only displays the current driver and current cost centre information. This information is entered and altered in the Driver History screen.

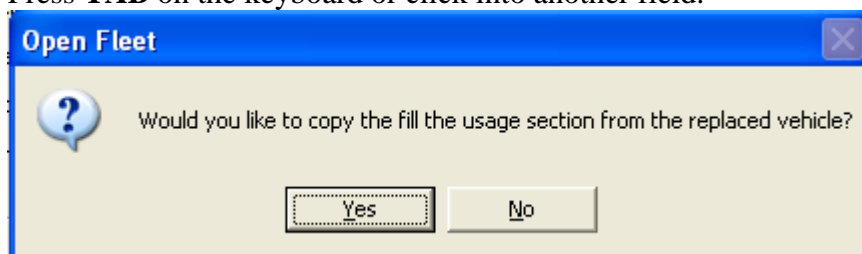


## Replacing a vehicle

Open Fleet has a quick method for replacing an existing vehicle which will copy the information in the usage section of the vehicle screen to a new vehicle.

### To replace an existing vehicle in the fleet:

- 1 Click the  **New Vehicle** Button on the Toolbar.
- 2 Enter the new vehicles **Registration** and **Model**.
- 3 Click  **Save**
- 4 Click **Purchasing** on the vehicle toolbar.
- 5 Enter the **Registration** of the old vehicle in the **replaces** field.
- 6 Press **TAB** on the keyboard or click into another field.



- 7 Click **Yes** to copy the Usage information from the old Vehicle to the new vehicle.

## Decommission a vehicle

There are two suggested methods for disposing a vehicle.

Where the disposal of the vehicle is known in advance:

- 1 As soon as it is known that the vehicle is to be disposed, create a booking for the vehicle.  
set the driver to **In for service**  
set the **from date** to the date the vehicle is due to be removed from availability  
set the **to date** to a date way in the future, eg add 1 to the year.

This will prevent anyone from booking the vehicle.

- 2 When the date for removal from service arrives, in the **Vehicle Screen** click the disposed box enter the date disposed and save changes. It will no longer be available for booking.
- 3 Use the **find box** to find the booking created in step 1.  
**Cancel** the booking. This is so that the statistics for the number of days vehicles in for service is not affected.

Where the disposal of the vehicle is not known in advance (eg a vehicle write off):

- ① Create a booking for the vehicle.  
set the driver to **In for service**  
set the **from date** to the date the vehicle was removed from service.  
set the **to date** to a date way in the future, eg add 1 to the year.
- ② Go into the running sheet and drag all bookings for that vehicle to another vehicle which is free if possible, If this is not possible the booking may have to be cancelled or a hire car used.
- ③ In the **Vehicle Screen** click the disposed box and save changes. This will remove it from the pool.
- ④ Use the **find box** to find the booking created in step 1.  
**Cancel** the booking. This is so that the statistics for the number of days vehicles in for service is not affected.

## Vehicle Expenses

Open Fleet now includes facilities to record and report on expenses relating to a vehicle.

Date	Odometer	Expense	Description	Quantity	Rate	Cost	GST	Cost Centre	OrderNo	InvoiceNo	Supplier
2/09/2010	34077	Fuel	Fuel (Unspecified Type)	20.32	1.2602	25.99	2.36				B.P.
22/09/2010	777	Fuel	Fuel (Unspecified Type)	38.88	1.1877	46.55	4.23				B.P.
24/09/2010	777	Fuel	Fuel (Unspecified Type)	39.43	1.3721	54.49	4.95				B.P.
27/09/2010	36260	Fuel	Fuel (Unspecified Type)	21.63	1.2093	26.54	2.41				B.P.

A sample vehicle expenses screen showing four fuel transactions.

### To Access the Expenses for a Vehicle

- ① Open the vehicle record.
- ② Click the **Expenses** Button on the vehicle toolbar.

### To Open an Expense

- ① Double click on the expense.

## To Add a New Expense

- 1 Click the **Add New Expense** Button.  
This will display the Expense window.

The screenshot shows the 'Expense 120' window with the following details:

- Date: 22/09/2010
- Odometer: 777
- Expense Type: Fuel
- Description: Fuel (Unspecified Type)
- Quantity: 39
- Rate: \$1.19
- Cost: \$46.55
- GST: \$4.23
- Supplier: B.P.
- Order No.: (empty)
- Invoice No.: (empty)
- Cost Centre: (empty)
- Location: HOBART
- Update Date: (empty)
- Source File: (empty)
- Ledger: (empty)
- Project: 000000

- 2 Enter the details of the expense and click **Save**.

## Non-Vehicles

Some organisations need to track assets that might not be vehicles as such. For example, Mowers, trailers, fuel cards and boats might fit this category.

If a vehicle is marked as a non-Vehicle then that asset will not be included in certain reports. These are:

- Vehicles,
- KPI Vehicle count ,
- Vehicle Due for Replacement (only if **Due for Replacement Date** is blank)
- Vehicle Registration (only if **Registration Expiry** is blank)
- Vehicles Average Daily Klms

Non-Vehicles are included in all other vehicle reports.

## Lists

The lists menu comprises the contents of all of the drop down lists in Open Fleet.

Some examples are

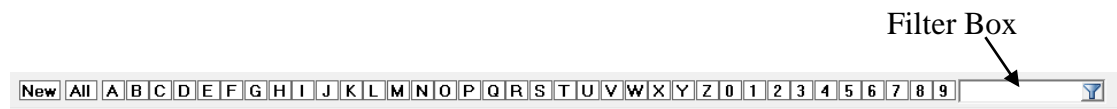
Disposal Methods	How a vehicle is disposed
Home Garaging Reason	Why is a vehicle Home Garaged
Manufacturer	Vehicle Manufacturer
Model	Vehicle Model
Premium Classes	Registration Premium Class
Service Types	Service Plans for vehicles
Suburbs	Locations of pools and destinations for travel
Suppliers	Vehicle Dealerships, Repairs, Service agents etc.
Tariffs	The list of charge out rates for hiring.
Cost Centres	The Departments that Staff / or vehicles belong to
Warranty Inspection Plans	These lists when a vehicle is required to be inspected for warranty reasons. Only a few manufacturers still use this.

### Warning!

When altering something in a list it will affect all vehicles, or bookings, that refer to that list. For example, suppose service type 10000/12 is changed from 12 months to 24 months. Then every vehicle that uses the 10000/12 service type will have its service entry changed to 24 months. In this case it would be better to create a new service type called 10000/24 with appropriate values.

## Filtering Lists

Some lists such as suburbs and cost centres can get very long. The filter bar makes it easy to quickly find specific entries.



- To add a new item in the list click **New**.
- To only show the list entries starting with a specific letter or number click the particular character.
- To enter any filter type it into the **Filter Box** and press the enter key.  
Eg. Entering **san** in the Filter Box would show all entries starting with San such as Sandybay Sandford.
- To show all entries click **All**

## Tariffs List

### Chargeback Fees (or hiring charges)

Open Fleet now features the ability to charge late return fees, including a flat rate late return fee, and / or a late back hourly fee charged per minute. This fee can differ for each vehicle type.

Tariffs

NewAllA B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9

	Tariff	Hourly Rate	Daily Rate	Late Back Hourly Rate	Klm Free	extra Klm rate	Late Back Flat fee	inactive
▶	4x4	\$2.50	\$110.00		0	\$ .40	\$ .00	<input type="checkbox"/>
	Large/Wagon	\$2.50	\$110.00		0	\$ .40	\$ .00	<input type="checkbox"/>
	Tractor	\$35.00	\$135.00			\$ .00	\$ .00	<input type="checkbox"/>
	Truck	\$45.00	\$155.00			\$ .00	\$ .00	<input type="checkbox"/>
								<input type="checkbox"/>

Hourly Rate	The rate charged per hour booked calculated in 15 minute intervals.
Daily Rate	The rate charged per day booked. Any booking over 6 hours is then charged at this Daily Rate.
Late Back Hourly Rate	The rate charged for each hour the vehicle is late (calculated per minute)
Klm Free	The permitted Kilometres the vehicle may travel prior to incurring a kilometre rate.
Extra Klm Rate	The rate charged for each kilometre above the <b>klm free</b> figure.
Late Back Flat Fee	The fee charged for a vehicle, which is returned late. This is in addition to the <b>Late Back Hourly Rate</b>

Inactive	This flag indicates that the tariff cannot be selected for a vehicle any more. It does not remove this tariff from any vehicles that are associated to the tariff.
----------	--

## Billing examples

### Simple

Vehicle booked from 9am till 11am the following day.

= 1 Day out + 2 Hours

= ( [Daily rate] \* 1 ) + ([Hourly rate] \* 2)

### Late return with a late back hourly rate set

But if the vehicle were returned 15 minutes late then the late fees would be added.

= (15 \* ([Late Back Hourly Rate])/60) + [Late Back Flat Fee]

### Late return without a late back hourly rate set (Late Key In)

However if the same vehicle were returned 15 minutes late and no value was set for a **late back hourly rate** (= zero)

Then time out would be

= 1 Day out + 2 Hours + 15 Minutes

= ( [Daily rate] \* 1 ) + ([Hourly rate] \* 2 ¼ ) + [Late Back Flat Fee]

### Early Pick up (early Key Out)

If the vehicle were collected 30 minutes early then the time out would be

= 1 Day out + 2 Hours + 30 Minutes

= ( [Daily rate] \* 1 ) + ([Hourly rate] \* 2 ½ ) + [Late Back Flat Fee]

## Changing Tariffs

It is recommended that organisations review their tariffs at least once per year to ensure they are recouping vehicle costs.

When a booking is made the rates and fees stay set for that booking even if changes to the tariffs are made in the Tariff List.

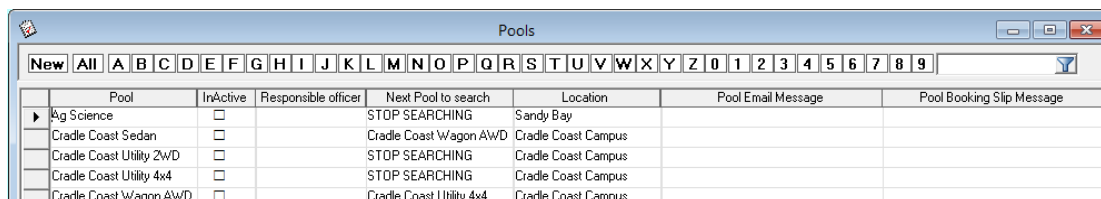
The only time the tariff will change for a booking is when that booking is moved to a new vehicle.

When changing tariffs, new bookings made after the tariff change will have the new booking tariffs applied, while existing bookings will remain on the old tariffs.

If your organisation would like a different procedure to occur please contact I.T. Guaranteed to discuss your requirements.

## Pools List

Perhaps the most important part of configuring Open Fleet is the setting up of pools and allocating cars to pools.

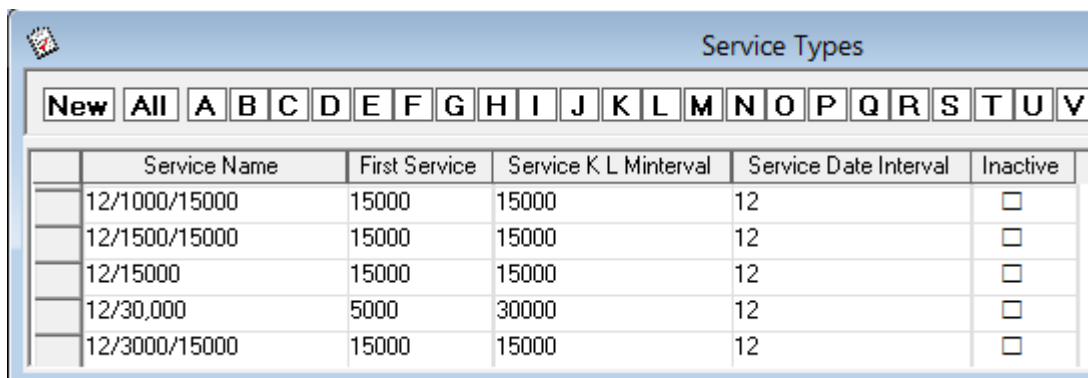


1. To setup pools click the **Options** button, then select **Pools** from the drop down list and click **go**.

Pool	Name of Pool
inActive	Makes the Pool no longer available for selection
Next Pool to Search	When searching for an available vehicle to book, if there are none in this pool this field specifies which pool should be search next.
Pool Location	This is used in the <b>Find a Lift</b> function. This specifies where the vehicle is permanently stationed. In the <b>Find a Lift</b> function, the location used here is searched for a vehicle that is due to return.
Pool Email Message	<p>This message will be emailed to the driver when the <b>Email Booking to Driver</b> function is used on the <b>Booking</b> screen.</p> <p>Recommended usage: a short message to tell the driver where to collect the vehicle</p>
Pool Booking Slip Message	<p>This message is printed on the Pool Booking Slip:</p> <p>Suggested use: Put the contact details of the Pool manager for this pool on the vehicle.</p>

## Service Types List

The service types list stores the different kinds of service types that your fleets vehicles may have.



Service Types					
<a href="#">New</a> <a href="#">All</a> <a href="#">A</a> <a href="#">B</a> <a href="#">C</a> <a href="#">D</a> <a href="#">E</a> <a href="#">F</a> <a href="#">G</a> <a href="#">H</a> <a href="#">I</a> <a href="#">J</a> <a href="#">K</a> <a href="#">L</a> <a href="#">M</a> <a href="#">N</a> <a href="#">O</a> <a href="#">P</a> <a href="#">Q</a> <a href="#">R</a> <a href="#">S</a> <a href="#">T</a> <a href="#">U</a> <a href="#">V</a>					
	Service Name	First Service	Service K L M Interval	Service Date Interval	Inactive
	12/1000/15000	15000	15000	12	<input type="checkbox"/>
	12/1500/15000	15000	15000	12	<input type="checkbox"/>
	12/15000	15000	15000	12	<input type="checkbox"/>
	12/30,000	5000	30000	12	<input type="checkbox"/>
	12/3000/15000	15000	15000	12	<input type="checkbox"/>

The **First service** field indicates the odometer reading that the vehicle should be first serviced.

The **Service KLM Interval** field indicates the odometer reading that the vehicle should be serviced following the second and subsequent services.

The **Service Date Interval** field indicates the time, in months, between subsequent services.

Some organisations may have some vehicles that they do not wish to track the servicing for. In this case they should assign the **never** service schedule to them.

It is wise to establish a good naming convention for the service types. The one used in the above screen shot gives a fair idea of what the service type is.

Eg. 12/10000 means every Service every 12 months or 10,000 klms.

## Warranty Inspection Plans

Some manufacturers require that their vehicles be checked after a certain period of time or kilometres as part of the vehicles warranty.



Warranty Inspection Plans				
<a href="#">New</a> <a href="#">All</a> <a href="#">A</a> <a href="#">B</a> <a href="#">C</a> <a href="#">D</a> <a href="#">E</a> <a href="#">F</a> <a href="#">G</a> <a href="#">H</a> <a href="#">I</a> <a href="#">J</a> <a href="#">K</a> <a href="#">L</a> <a href="#">M</a> <a href="#">N</a> <a href="#">O</a> <a href="#">P</a> <a href="#">Q</a> <a href="#">R</a> <a href="#">S</a>				
	Warranty Inspection Plan	Weeks	Kilometres	Inactive
▶	4/1000	4	1000	<input type="checkbox"/>
	6/1500	6	1500	<input type="checkbox"/>
	8/3000	8	3000	<input type="checkbox"/>
				<input type="checkbox"/>



# Options

Open Fleet has numerous options for configuring Open Fleet to work according to the policies and billing practices of a wide variety of organisations.

## To open the options screen

- 1 Select **Tools, Options** from the menu bar

The screenshot shows the 'Options' dialog box with the 'Organisational Policies' tab selected. The dialog contains several sections with radio buttons and checkboxes for configuration.

- Drivers Viewing Running Sheet:**
  - ☒ Drivers cannot view Running Sheet
  - ☐ Drivers can view Running Sheet with just green lines
  - ☐ Drivers can view Running Sheet with regos and green lines
  - ☐ Drivers can view Running Sheet with regos and driver names
  - ☐ Drivers can open & edit other user's bookings (NOT RECOMMENDED)
- Who can see the Drivers Licence Number:**
  - ☐ No One
  - ☒ Administrators Only
  - ☐ Administrators and Financial Controllers
  - ☐ Administrators, Financial Controllers and Key Keepers
  - ☐ Administrators, Financial Controllers, Key Keepers and Booking Admins
- Cost Centre Managers Permissions:**
  - ☒ Allow Cost Centre Managers to add new users (Drivers Only)
  - ☒ Allow Cost Centre Managers to view vehicles
  - ☐ Allow Cost Centre Managers to edit vehicles
- Bookings:**
  - ☒ Allow Bookings to be made for drivers with expired licences
  - ☐ Allow drivers with expired licences to make a booking
  - ☒ Prevent Double Bookings\*
  - ☐ Drivers may select vehicle
  - ☐ Use Requisition Numbers
  - ☐ Requisition Number must be entered
  - ☒ Purpose must be entered
  - Maximum Booking Length (Days)
- Running Sheet:**
  - ☐ Display Vehicle Fitted Options in Running Sheet
  - ☐ Display Destinations on Running Sheet
  - ☐ Ask for Kilometres after Key in
- New User Self Registration:**
  - ☐ Let New Users Register by Driver's Licence Number
  - ☐ Let New Users Register by Surname

At the bottom right, there are 'OK' and 'Cancel' buttons.

The options are grouped into five areas.

Option Group	Functions
Organisational Policies	Here is where the policies of the organisation can be set. This affects how users can use Open Fleet and what functions they get access to.
Billing	Billing options include passenger billing settings and booking locking
Defaults	The defaults contain the default calendar reporting options and the vehicle hire account
Message wording	The message wording options is the place to customise the various emails and legal message wording for Open Fleet
System Settings	Include system settings for configuring Open Fleet within your organisation

## Organisational Policies

### Drivers viewing running sheet

New to Open Fleet 3.0 is the ability for drivers to view the running sheet. Some organisations have requested this as it suits the needs of a smaller organisation.

Drivers Viewing Running Sheet

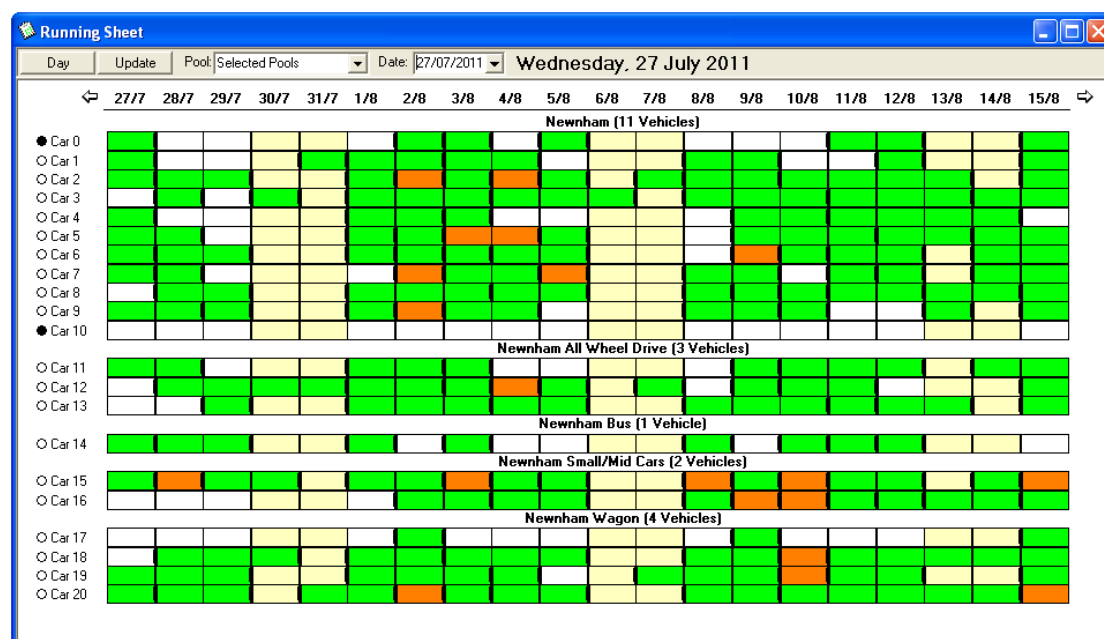
- ☐ Drivers cannot view Running Sheet
- ☒ Drivers can view Running Sheet with just green lines
- ☐ Drivers can view Running Sheet with regos and green lines
- ☐ Drivers can view Running Sheet with regos and driver names
- ☐ Drivers can open & edit other user's bookings (NOT RECOMMENDED)

#### Drivers cannot view running sheet.

This is the default Open Fleet setting. Non-elevated users, users without special account type are prevented from viewing the running sheet.

#### Drivers can view Running Sheet with just green lines.

This setting allows all users that can logon the ability to see if a vehicle may be free. It is useful as the user can see for example, that a vehicle is not available from 9 till 5, but there is one available from 9 to 3 which may have to do. The user could not get this information from the new booking window.

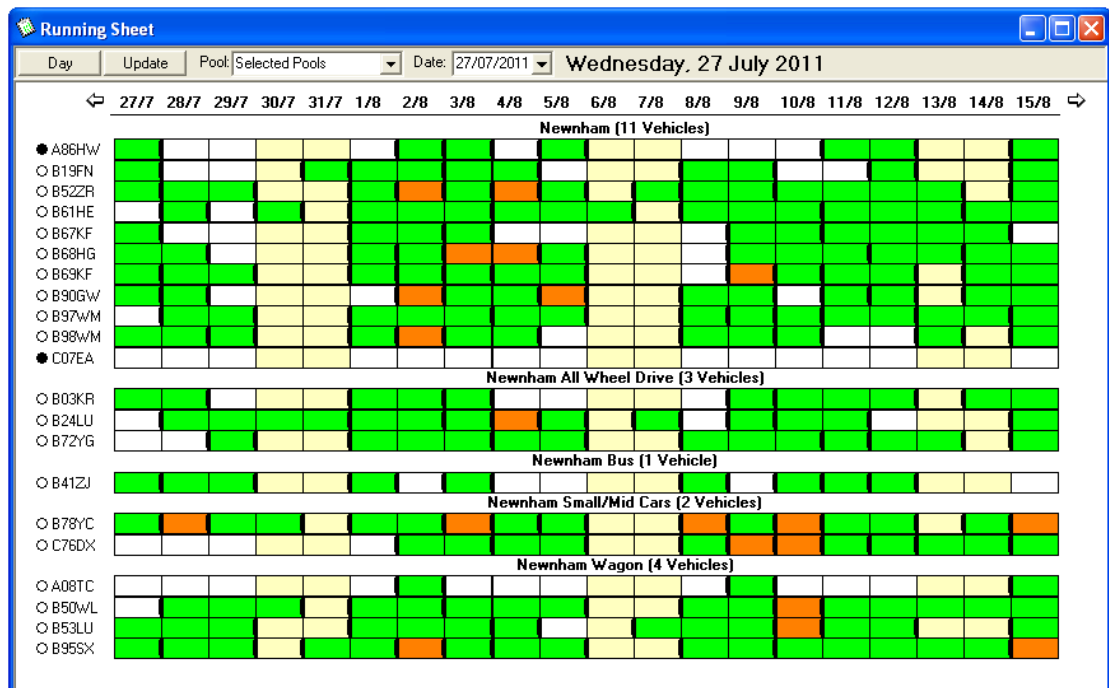


Shows when cars are available

It is important to note that this option hides the exact car from view, until the user books it. So this option provides additional functionality without impinging upon Smart booking, by allowing users to select vehicles themselves.

#### Drivers can view Running Sheet with Regos and Green Lines.

This choice allows all users that can logon the ability to see if a vehicle may be free. It is useful as the user can see for example, that a vehicle is not available from 9 till 5, but there is one available from 9 to 3 which may have to do. The user could not get this information from the new booking window.



## The Access level 2: Vehicle Registrations are available

This choice shows the vehicle details. This does allow the user to select which vehicle they wish to book, which could have a negative impact on fleet utilisation. However in the case of smaller organisations, particularly those that have a wide variety of special purpose vehicles this choice may be appropriate. For example if an organisations pool in one regional area comprises of a diesel 4x4, a Utility, a station wagon and a small hatchback, it may be very practicable to select the best suited vehicle that is available at the time.

This choice still doesn't show who has booked out which vehicle, which may suit organisations that have privacy concerns about releasing the names of drivers.

## Drivers can view Running Sheet with Regos and Driver Names.

This selection expands on the previous selection by showing everything on the running sheet that Fleet Administrators can see. That is, Car Registrations, Booking lengths, and Driver names.

**Running Sheet**

Day: [Update] Pool: [Selected Pools] Date: [27/07/2011] **Wednesday, 27 July 2011**

Navigation: 27/7 28/7 29/7 30/7 31/7 1/8 2/8 3/8 4/8 5/8 6/8 7/8 8/8 9/8 10/8 11/8 12/8 13/8 14/8 15/8

**Newnham (11 Vehicles)**

- A86HW: Webb, [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank]
- B19FN: [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank]
- B52ZR: [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank]
- B61HE: [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank]
- B67KF: [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank]
- B68HG: [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank]
- B69KF: [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank]
- B90GW: [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank]
- B97WM: [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank]
- B98WM: [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank]
- C07EA: [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank]

**Newnham All Wheel Drive (3 Vehicles)**

- B03KR: [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank]
- B24LU: [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank]
- B72YG: [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank]

**Newnham Bus (1 Vehicle)**

- B41ZJ: [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank]

**Newnham Small/Mid Cars (2 Vehicles)**

- B78YC: [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank]
- B76DX: [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank]

**Newnham Wagon (4 Vehicles)**

- A08TC: [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank]
- B50WL: [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank]
- B53LU: [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank]
- B95SX: [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank], [blank]

**The Access level 3: Includes who has booked the vehicle**

This may suit organisations that have no privacy issues about drivers names being available and no issues about staff being able to select their vehicle thereby reducing the utilisation of the fleet.

The negatives of this choice is that the consequences of allow drivers to select which vehicle they want may mean that popular vehicle get booked first rather than booking vehicles according to best utilisation practices.

## Drivers can open and edit other user's bookings. (NOT RECOMMENDED)

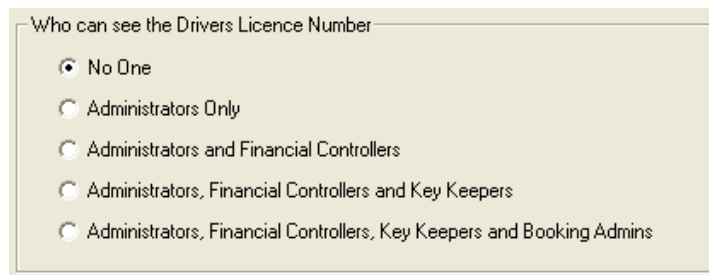
This is the ultimate privilege that can be granted to non-elevated users.

It is not recommended as any one in the organisation can change anyone else's bookings even switching vehicles against their wishes and against the wishes of the Fleet Administrator.

However in a very small and friendly organisation this option may be more practically minded rather than security conscious.

## Who can see the driver's licence number

This option deals with which user account type can view the user's driver's Licence Number in the User's window or if they will just see asterisks (\*).

A screenshot of a settings window titled "Who can see the Drivers Licence Number". It contains five radio button options: "No One" (selected), "Administrators Only", "Administrators and Financial Controllers", "Administrators, Financial Controllers and Key Keepers", and "Administrators, Financial Controllers, Key Keepers and Booking Admins".

The choices available.

A screenshot of a settings window titled "Authorised to Drive Vehicle". It has a checked checkbox and a sub-section "Driver Details" containing a "License:" label and a text box with "xxxxxx" inside.

From the User's window, the user of this system cannot see the driver's licence number.

Some organisations have stringent privacy concerns and need to limit who can view a users driver's licence number.

Some organisation's reside in states where there is a legal obligation to track and check license numbers to ensure a driver is legally authorised to drive a vehicle.

To balance these needs, Open Fleet offers a number of choices.

## Allow Cost Centre Managers to add new users (Drivers Only)

If this option is selected, Cost Centre Managers will be able to add new users to Open Fleet. The new users may only be drivers as Cost Centre Managers cannot allocate any high permissions than that. The Cost Centre Managers can only add drivers to their own cost centres.

Built in to Open Fleet, Cost Centre Managers can already login and view the bookings, and the drivers that belong to the cost centre managers allocated cost centre.

To allocate cost centres to a cost centre manager refer to page 35.

## Allow Cost Centre Managers to view vehicles

This option will allow Cost Centre Managers to be able to view the vehicles that belong to their assigned cost centres.

## Allow Cost Centre Managers to edit vehicles

This option will allow Cost Centre Managers to be able to edit the vehicles that belong to their assigned cost centres, as well as change driver history and accident information.

## Allow Bookings to be made for drivers with expired licences

Some organisations have policies that are stricter than others. With this in mind Open Fleet offers the choice of preventing or permitting bookings being made **for** Users whose license has expired from booking a vehicle.

## Allow drivers with expired licences to make a booking


Some organisations have policies that are stricter than others. With this in mind Open Fleet offers the choice of preventing or permitting bookings being made **by** Users whose license has expired from booking a vehicle.


## Prevent Double Bookings

Selection this option will cause Open Fleet not to make a double booking particularly when booking repeat bookings with manually selected vehicles.

For an in depth discussion on Double Booking Prevention and its limitations see page 84.

## Drivers may select vehicle

The choice allows anyone, not just the administrator, to manually select the vehicle for a booking. The  Select Vehicle Button on the New Booking window will only be shown if this choice is selected.



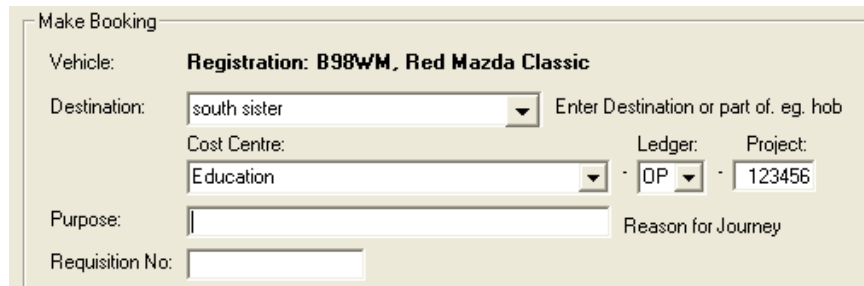
Manually  
Select  
Vehicle

### Warning!

Manually selecting vehicles will interrupt the 'smart booking' feature of Open Fleet. This will result in decreased capacity of the overall pool.

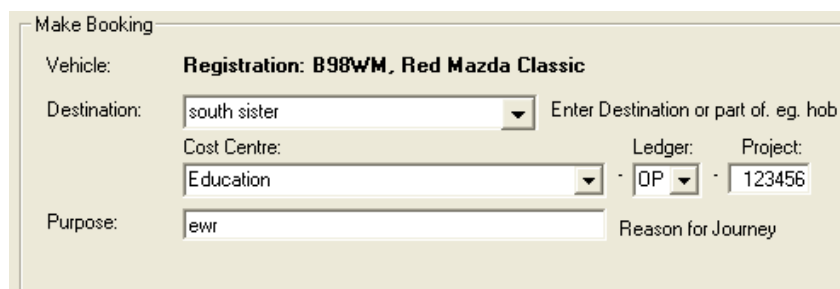
## Use Requisition Numbers

Checking this box causes requisition numbers to show on the New Booking window.



The screenshot shows the 'Make Booking' window. The 'Vehicle' field is set to 'Registration: B98WM, Red Mazda Classic'. The 'Destination' dropdown is set to 'south sister'. The 'Cost Centre' dropdown is set to 'Education'. The 'Ledger' dropdown is set to 'OP'. The 'Project' field is set to '123456'. The 'Purpose' field is empty. The 'Requisition No.' field is empty. The 'Reason for Journey' field is empty.

An extract of the new booking window with this setting checked



The screenshot shows the 'Make Booking' window. The 'Vehicle' field is set to 'Registration: B98WM, Red Mazda Classic'. The 'Destination' dropdown is set to 'south sister'. The 'Cost Centre' dropdown is set to 'Education'. The 'Ledger' dropdown is set to 'OP'. The 'Project' field is set to '123456'. The 'Purpose' field is set to 'ewr'. The 'Requisition No.' field is empty. The 'Reason for Journey' field is empty.

An extract of the new booking window with this setting unchecked

## Requisition Number must be entered

Selecting this forces the user to enter a requisition number.

## Purpose must be entered

Selecting this forces the user to enter a purpose for the journey

## Maximum Booking Length (Days)

The reason why a maximum length of booking is required is for billing details.

Open Fleet only bills, via the General Journal report, once a booking has completed. Thus if a booking were to last 12 months or longer, the user's cost centre would not be billed until completion of the booking.

Thus it is recommended that the maximum booking length be 32 days. Which allows for just over 1 month to be booked.

If a vehicle is required to be booked for longer than that, then recurring bookings should be used to create a recurring booking of 7 days duration for example.

If your organisation does not back charge the hiring then this figure could be set to 365 days.

## Display Destinations on Running Sheet

This will cause the destinations of bookings to be shown next to the surname on the running sheet.



## Display Vehicle Fitted Options on Running Sheet

This choice will cause all of the fitted options in the vehicles to be displayed in the tooltips of the vehicles.

## Ask for Kilometres after Key in

This option causes the Running Sheet to display the odometer entry window after key-in occurs.

## Let New Users Register by Driver's Licence Number

Selecting this will allow new users that have installed Open Fleet, the ability to register themselves on the system without needing to know their Username first.

This option may be practical in an organisation that has been using Open Fleet (or its predecessor) for years but has not permitted Users to logon until recently.

This option saves the Fleet Administrators and the Booking Administrators from having to go into each and every user record and enter the username of that user.

**In order for this to work the driver's licence of the users must already be entered.**

Every user that successfully enters a valid Driver's licence will be granted logon access to Open Fleet.

So if your organisation does not want everyone to have access to Open Fleet then this option is not recommended.

## Let New Users Register by Surname

Checking this will allow new users that have installed Open Fleet, the ability to register themselves on the system without needing to know their Username first.

Here they can register by Surname rather than by licence number as in the previous choice

This selection is used in conjunction with the previous one.

It does come with the warning that using this does open the system to possible security breaches but only for accounts where a username is not recorded. Once a user registers, their account is secured in that only they can then logon to it. If this option is used, then it is strongly recommended that it only be turned on for a couple of days to allow large numbers of users to self-register.

## Billing

Open Fleet allows each organisation to determine how billing is calculated

The screenshot shows the 'Options' dialog box with the 'Billing' tab selected. The dialog has five tabs: 'Organisational Policies', 'Billing', 'Defaults', 'Message Wording', and 'System Settings'. The 'Billing' tab contains the following settings:

- 'Booking locked from editing after X days from start date' is set to '2'. A note in parentheses says '(Does not apply to Administrators or Booking Admins)'.
- 'Bill from check out time if before booking time' is unchecked.
- 'Bill from return time if later than booking time (Only applies if no late hourly rate for vehicle booked)' is checked.
- 'Bill only until key in time if keys are returned early (Saves users money & encourages efficient bookings)' is checked.
- 'Passenger Billing' section:
  - 'Passengers ride free' is selected with a radio button.
  - 'Passengers pay equal share of leg of journey' is unselected.
  - 'Passengers pay equal share of journey' is unselected.
  - 'Cost of shared trip is paid by' is unselected, with a sub-section containing 'Ledger:' and 'Project:' dropdown menus. The 'Project:' dropdown is currently set to '000000'.
- 'Do not allow users to have a default project number' is checked.
- 'Do not allow zero a project number to be entered for bookings' is checked.

At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

**The Billing Options**

### Booking locked from editing after X days from start date

Locking a booking from being edited prevents users tampering with bookings. For example if this was set very high then a user could after returning a car, reduce the length of the booking or even cancel the journey, which they had already used.

It is recommended a setting of zero or 1 be used here.

### Bill from check out time if before booking time

Selecting this cause Open Fleet to book from the time the keys were collected, rather than from the time of the booking (if that time is before the booking time.)

### Bill from return time if later than booking time

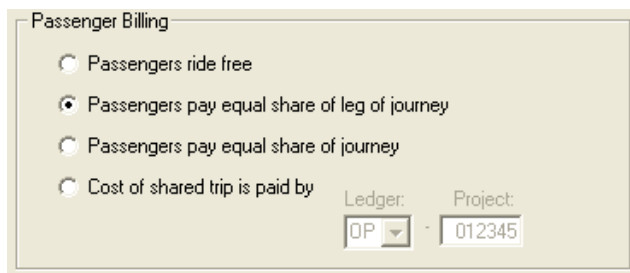
Checking this will cause Open Fleet to bill for the entire time the vehicle was out if that is greater than the booking time.

### Bill only until key in time if keys are returned early

This option rewards the driver of the vehicle by only billing for the time used as opposed to the time billed. Additionally with this option the booked time is also altered so that the vehicle is available for another booking.

## Passenger Billing

New to Open Fleet is the ability to book and bill shared journeys.



Passenger Billing

☐ Passengers ride free  
☒ Passengers pay equal share of leg of journey  
☐ Passengers pay equal share of journey  
☐ Cost of shared trip is paid by

Ledger:  Project:

### The Passenger Billing Options

#### Passenger Ride Free

Full costs of the trip are still billed to the Driver's Cost Centre. Passengers incur no charge. Open Fleet will just handle the booking arrangements.

#### Passengers pay equal share of leg of journey

Each journey is divided into two parts, travel to the destination and the return leg. Passengers may travel on just one or both of these parts.

This selection shares the cost of a leg of a journey rather the entire journey. The screen capture below shows the billing split.

Travelling to Hobart on 05 Aug 2011 at 9:00:00 AM								
Cancel	Name	Phone	Mobile	Email	CostCentre	Ledger	Project	Fee
	David Burleigh (Driver)			David.Burleig	Centre for Advancement L	OP	55277	62.5
<input type="checkbox"/>	Jay Burleigh	041933531	0363263073	Jay.Smith@I	Education	OP	123456	62.5
Returning to Launceston on 06 Aug 2011 at around 5:00:00 PM - CONFIRM THIS TIME WITH DRIVER								
Cancel	Name	Phone	Mobile	Email	CostCentre	Ledger	Project	Fee
	David Burleigh (Driver)			David.Burleig	Centre for Advancement L	OP	55277	125

#### Passengers paying equal share of leg of journey

## Passengers pay equal share of journey

This selection simply divides the full cost of the journey by the total number of travellers.

Travelling to Hobart on 05 Aug 2011 at 9:00:00 AM

Cancel	Name	Phone	Mobile	Email	CostCentre	Ledger	Project	Fee
	David Burleigh (Driver)			David.Burleig	Centre for Advancement L	OP	55277	83.33
<input type="checkbox"/>	Jay Burleigh	041933531	0363263073	Jay.Smith@l	Education	OP	123456	83.33

Returning to Launceston on 06 Aug 2011 at around 5:00:00 PM - CONFIRM THIS TIME WITH DRIVER

Cancel	Name	Phone	Mobile	Email	CostCentre	Ledger	Project	Fee
	David Burleigh (Driver)			David.Burleig	Centre for Advancement L	OP	55277	83.33

## Passengers paying equal share of journey

## Cost of shared trip is paid by

Some organisations like to provide a stimulus to vehicle sharing. Thus they may wish to offer that the entire journey of a shared ride is paid for by a separate cost centre. This selection permits that option.

## Do not allow users to have a default project number

This option prevents users from having a default project number

## Do not allow zero project number to be entered for bookings

This option prevents users from entering a booking with a 0 (zero) for a project number.

## Defaults

### Reports use

Set this option to choose what date range annual reports in your organisation default to.

Users can manually choose other date ranges.

### First Day of the Week is

Set this option according to your organisations first day of the week policy. This affects the billing cycle, as items billed on a Sunday will be included in "Last week" billing or "This week" billing

### Default vehicle replacement (years)

When entering a new vehicle, the default vehicle replacement (Years) is added to the date of purchase to give the Due for Replacement Date.

The user may override this.

## Default vehicle replacement (Klms)

When entering a new vehicle, the default vehicle replacement (Klms) is entered to the Due for Replacement Klms figure.

The user may override this.

## Vehicle Hire Account

This is the account number that the vehicle hire will be charged to.

## Fuel Account

This is the account number that the fuel costs will be charged to.

## Show Cost Centre Numbers

When ticked all reports that display a cost centre field will also display the cost centre code before the Cost Centre Field

## Number of digits in Project Code

Different organisations have different size of project fields. This field sets how many digits should be in the project code.

## On open check active bookings for early return

If ticked, every time Open Fleet is started, Open Fleet will search for bookings the user currently has out and ask if the user wishes to return the keys early.

## Home Garage times

Some organisations have some vehicles that are permanently assigned to a driver, but require that the vehicle be available to be booked by others should there be a need. For example a special salary package. Thus the driver of the vehicle needs the vehicle to get from and to work each day, but during work hours the vehicle needs to be available to be booked, even by the assigned driver, to be used.

Home Garage AM time	9	00	AM
Home Garage PM time	4	30	PM

**This sample shows that the vehicle is available to the pool at 9am each day but leaves at 4:30.**

The Home Garage AM Time indicates the time that the vehicle is back in the pool of a morning.

The Home Garage PM time indicates the time the vehicle is unavailable from each day.

On the running sheet these Home Garaged vehicles are shown a booked out between the times they at “at home”. In the example this would be booked out from 4:30 until 9am on the next Weekday.

## Core Hours Times

Core Hours AM Time	<input type="text" value="9"/> <input type="text" value="00"/> <input type="text" value="AM"/>
Core Hours PM time	<input type="text" value="5"/> <input type="text" value="00"/> <input type="text" value="PM"/>

The core hours specifies the out of hours shading on the running sheet.

THURSDAY 3/7	
Wood	
wells	
Parsons	
	Zimmerli

## Message Wording

There a number of messages that occur in Open Fleet that can be customised by the Fleet Administrators.

Sometimes there may be a legal need to include specific text.

The Message Wording Tab is the place to configure these messages

The screenshot shows the 'Options' dialog box with the 'Message Wording' tab selected. The dialog has five tabs: 'Organisational Policies', 'Billing', 'Defaults', 'Message Wording', and 'System Settings'. The 'Message Wording' tab contains several message templates that can be customized. Each message has a label on the left and a text area on the right. The messages are: 'Booking Email Message', 'Licence Expiry Email', 'Booking Legal Warning', 'No Vehicles Text', and 'Late Return Email Message'. Each message template includes placeholders for dynamic data, such as dates, times, and vehicle details. The 'Late Return Email Message' template includes a section for 'NumLateReturns'.

Booking Email Message	Vehicle Booking - pickup from <<pickup>> on <<datefrom>> [<<make>> <<model>>] [booking id: <<bookingid>>]  Your vehicle booking has been confirmed from <<datefrom>> <<timefrom>> and returning <<dateto>> <<timeto>>. Please check the following details carefully and advise if any are incorrect, or if you no longer require the vehicle.  Driver: <<given>> <<surname>> From: <<datefrom>> <<timefrom>> To: <<dateto>> <<timeto>>
Licence Expiry Email	According to our records your Driver's Licence is due to expire soon. Please bring your license to Transport Office in order to update our records
Booking Legal Warning	I certify the above named driver holds a current licence to drive this motor vehicle
No Vehicles Text	Sorry, There are no Vehicles Available. Please try another Pool or email Transport office for assistance.
Late Return Email Message	Late Vehicle Return Dear <<given>>,  We noticed that you returned a company vehicle late on <<KeyInDate>>  We understand that from time to time late returns cannot be helped. To date you have had <<NumLateReturns>> late returns.  Our organisation uses a pool of vehicles that are available to all staff. Many times vehicles are booked back to

OK Cancel

## Booking Email Message

This is the email message that is sent to the user when a booking is made or changed.

## Licence Expiry Email

This is the email that may be sent in bulk to all users whose licenses have expired according to Open Fleet.

## Booking Legal Warning

The Booking Legal Warning must be checked before a booking can be made

☐ I certify the above named driver holds a current licence to drive this motor vehicle

**A sample booking legal warning**

## No Vehicles Text

This is the message that displays when no vehicles are available to be booked. It is helpful here to include a phone number that the user can call for assistance.

## Late Return Email Message

This message template may be sent to drivers that return bookings late. When a booking is keyed in late the operator will be asked if they wish to send a late return email message. The prefilled message opens on the operators screen ready to be edited, or sent.

## Odometer entry

Keeping track of the vehicles odometer readings is a crucial task in managing a vehicle fleet. The odometer is used to track

- Next Service Dates
- Vehicle Replacement dates (change over)
- Unauthorised vehicle usage

Open Fleet has a number of ways of capturing the vehicle odometer readings

- Monthly Audit
- Import from a fuel file supplied from the fuel company
- Import from a CSV (comma separated Value) file
- Entered upon Booking return.
- Adhoc entry

### Monthly Audit

This method involves printing a report from Open Fleet and taking the report to the car park and recording each vehicle's odometer reading.

#### Note!

This method will only update the current odometer reading on the vehicle screen. It will not create a historical odometer record for calculating actual kilometres travelled in a month. If that is required use the Import odometer from Spreadsheet method.

To print the report:

- 1 From the menu bar select, Lists, Quick Lists, **Vehicle Odometer Readings**
- 2 Click **Print**

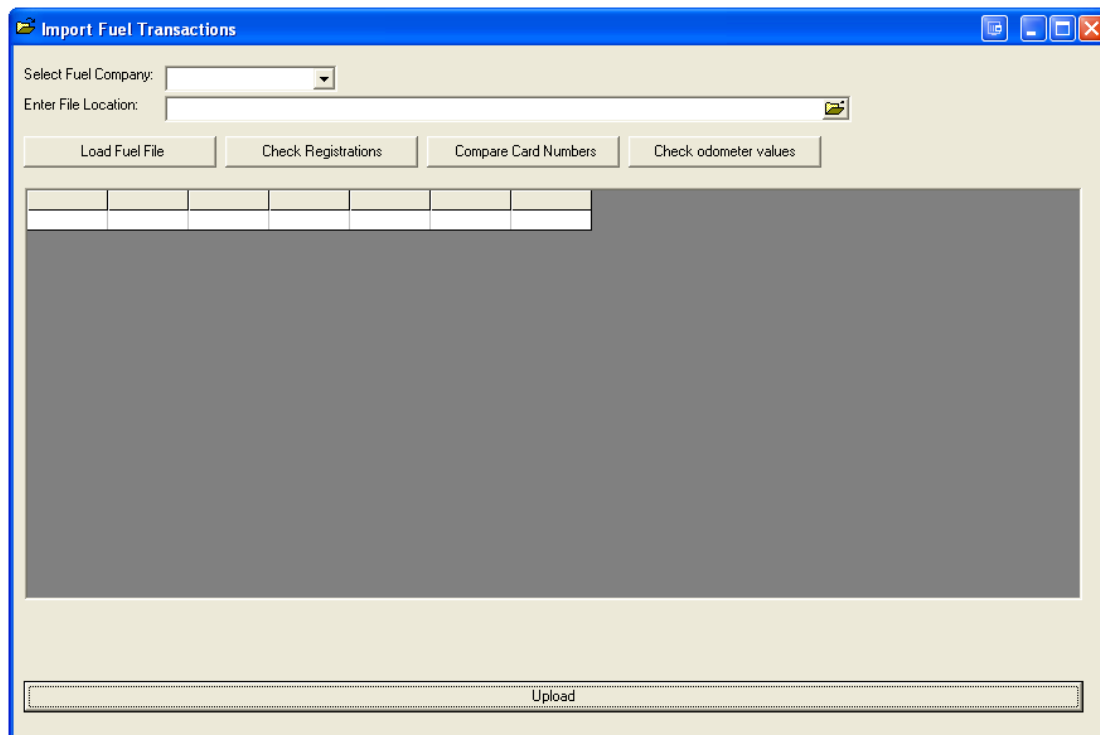
Pool	Registration	odometer	Lastodo Update
Newnham	B68HG	130421	2/09/2013
Newnham	B69KF	125596	23/08/2013
Newnham	B67KF	128681	5/09/2013
Newnham	A86HW	131103	26/08/2013
Newnham	B90GW	129445	26/08/2013
Newnham	B19FN	136798	5/09/2013
Newnham	B61HE	149741	27/08/2013
Newnham	B97WM	116660	2/09/2013
Newnham	B98WM	117792	2/09/2013
Newnham	B52ZR	105167	5/09/2013
Newnham	C07EA	92180	5/09/2013
Newnham 4WD	A30VI	39866	2/09/2013
Newnham All Wheel Drive	A082B		

Once collected the odometer readings can be entered on this screen.



## Import from a fuel file supplied from the fuel company

The easiest and quickest way to update the odometer values for all vehicles in the fleet is to collect it from the fuel companies. When filling up with petrol the driver is asked for the odometer reading. This reading is entered into the Fuel Companies computer.



**The Import Fuel Transactions window**

At the end of the month the fuel company then makes available a file for download. This file can then be uploaded into Open Fleet updating each vehicles fuel usage as well as each vehicles odometer reading.

### To open the Import Fuel File window

- 1 Select **Tools, Import Fuel File** from the menu bar.

## Import from an Excel file

Another way to upload the odometer readings is from a saved Excel file.

Some organisations which have geographically disbursed vehicle home bases may prefer to have one individual in each location record the odometer reading for each vehicle in their location once a month in an excel file.

	A	B	C	D	E	F	G
1	RegistrationNo	Odometer					
2	C64KF	10863					
3	C48TD	3150					
4	G05AP	30707					
5	C62HK	58006.2					
6	SPARE57	70747					
7	G16AX	20587					
8	G30BF	2713					
9	C40YP	27					
10	C98DB	33159					
11	G22AQ	11200					
12	G21AX	23372					

*Note: The vehicle registration must be in the first column and the odometer reading must be in the second. Headings are optional.*

## To open the Import Odometer window

- 1 Select **Tools, Import Odometer Readings** from the menu bar.

Enter File Location: C:\Documents and Settings\Jay\My Documents\CLIENTS\OpenFleet\odoreadings.csv

Header Row: ☒

Load File

Check Registrations Check odometer values Check Region Check Duplicates

Rego	Odometer
C64KF	10863
C48TD	3150
G05AP	30707
C62HK	58006
SPARE57	70747
G16AX	20587
G30BF	2713
C40YP	27
C98DB	33159
G22AQ	11200
G21AX	23372
G13AQ	15967
C17SI	5366
B60YZ	26993
C13EB	12790
C59DZ	2787
C69DA	41208
D5ZYN	43542
C58MG	14224

This list shows the entries that will be loaded into OpenFleet. The list should be visually checked to confirm the values look realistic and are in the correct column. Eg. Check that the Surnames are in the surnames column, the email in the email column etc.

Posting Date: 28/02/2013

Import Close

For more instructions on Loading Odometer Readings from Excel see Page 96

## Entered upon vehicle return.

The odometer may be entered into Open Fleet upon return of the keys.

To enter the odometer reading

- ① Click the **Running Sheet** button.
- ② Right click on the booking.
- ③ From the shortcut menu click **Enter Kilometers**

- ④ Enter the Starting and Finishing Odometer reading.

### Alternate method

If the **Ask for kilometres after Key in** is selected in the **Other options** section of the **Options** screen, then the **Kilometres Entry** dialog box is displayed automatically upon **Keying in** the vehicle.

## Adhoc entry

The odometer may be typed directly into the **odometer** field on the **Vehicle** screen

# Double Booking Prevention

New to Open Fleet is double booking prevention.

A double booking is when a vehicle is booked more than once for an overlapping time span.

Double Booking Prevention does not stop entirely double bookings but it does severely limit it to Administrators who are intent on making it happen.

Normal booking should not cause a double booking to be created.

It is only when manually selecting vehicles that a double booking could occur. But now in Open Fleet manually selecting vehicles is limited to selecting from the vehicles that are available for the dates and times specified.

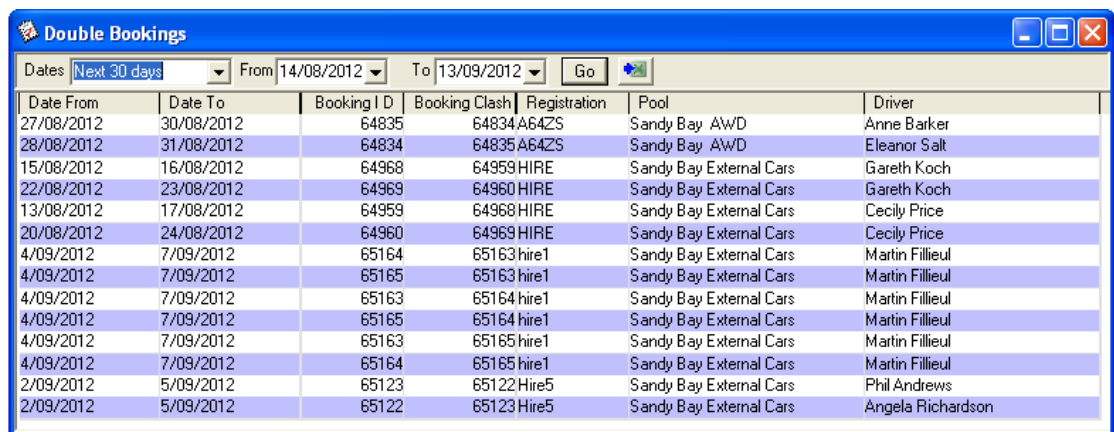
It is still possible to create double bookings by,

- Creating a repeat booking using a manually selected vehicle (if Prevent Double bookings is not checked in options)
- Dragging a booking on the running sheet to another vehicle that already has a booking.

In these cases no prevention of doubling booking occurs.

## Double Booking Report

A new report in Open Fleet reports on upcoming double bookings giving the administrators the opportunity to resolve the problems.



Date From	Date To	Booking ID	Booking Clash	Registration	Pool	Driver
27/08/2012	30/08/2012	64835	64834	A64ZS	Sandy Bay AWD	Anne Barker
28/08/2012	31/08/2012	64834	64835	A64ZS	Sandy Bay AWD	Eleanor Salt
15/08/2012	16/08/2012	64968	64959	HIRE	Sandy Bay External Cars	Gareth Koch
22/08/2012	23/08/2012	64969	64960	HIRE	Sandy Bay External Cars	Gareth Koch
13/08/2012	17/08/2012	64959	64968	HIRE	Sandy Bay External Cars	Cecily Price
20/08/2012	24/08/2012	64960	64969	HIRE	Sandy Bay External Cars	Cecily Price
4/09/2012	7/09/2012	65164	65163	hire1	Sandy Bay External Cars	Martin Fillieul
4/09/2012	7/09/2012	65165	65163	hire1	Sandy Bay External Cars	Martin Fillieul
4/09/2012	7/09/2012	65163	65164	hire1	Sandy Bay External Cars	Martin Fillieul
4/09/2012	7/09/2012	65165	65164	hire1	Sandy Bay External Cars	Martin Fillieul
4/09/2012	7/09/2012	65164	65165	hire1	Sandy Bay External Cars	Martin Fillieul
2/09/2012	5/09/2012	65123	65122	Hire5	Sandy Bay External Cars	Phil Andrews
2/09/2012	5/09/2012	65122	65123	Hire5	Sandy Bay External Cars	Angela Richardson

This report is also summarised in the Exception Overview report.

# Service and Repair of Vehicles

Open Fleet includes a report specifically for assisting with the scheduling of regular maintenance.

## To open the Due for Service report

- 1 From the menu bar select Reports, Vehicle, Due for Service.

Registration No	Pool	Odometer	K Lmdue	Last Service Klm	last Service Date	Date Dueby Time	Date Duebyklms	Earliest Date Due
FH0509	Student Accommodation	0	1000			19/06/2006		19/06/2006
FL0213	Sandy Bay Large Cars	0	1500		022/06/2006	22/06/2007		22/06/2007
A23KA	Student Services	77668	6000	0		9/06/2009	10/12/2007	10/12/2007
A12AB	PAH AMS Hobart Vehicle		1000			30/09/2008		30/09/2008
A86HW	Newnham	93163	1000	0		4/05/2009	29/10/2008	29/10/2008
A82GV	Rural Health	0	1000			17/04/2009		17/04/2009
A65PY	Cradle Coast Small/Mid	85561	6000	0		16/09/2009	22/05/2009	22/05/2009
A28MB	NCMCRS	0	1000			27/05/2009		27/05/2009
A31QF	Chemistry	0	1000			10/08/2009		10/08/2009
A700G	Goods Inwards	0	1000			1/09/2009		1/09/2009
A08TC	IT Resources	46850	6000	0		11/12/2009	27/09/2009	27/09/2009
A27SU	TIAR Burnie		1000			22/10/2009		22/10/2009
A25SU	TIAR Burnie		1000			28/10/2009		28/10/2009
A78RU	TIAR Burnie		1000			11/11/2009		11/11/2009
A79RU	TIAR Burnie		1000			11/11/2009		11/11/2009
A47TV	TIAR Launceston		1000			13/11/2009		13/11/2009
A30VI	AMS Launceston	0	1000			27/11/2009		27/11/2009

**The Due for Service Report showing the estimated next date due for service**

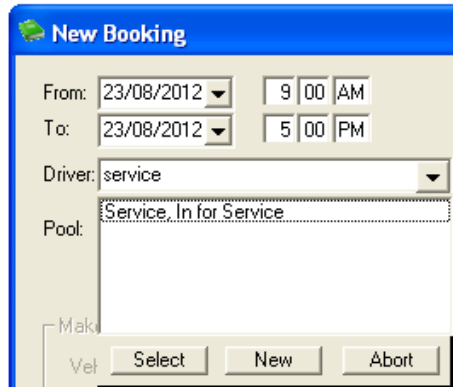
The Due for Service report calculates the next date due for service by taking the last date & odometer of service and projecting forward by the average distance travelled per day until it reaches the time or distance required in the Vehicle's service plan.

In order for the Due for Service report to function certain fields **must** be entered for each vehicle. These are:


<b>Services Schedule</b>	This is a drop box, which indicates how frequently the vehicle should be serviced according to its service plan.
<b>Last Service KLM</b>	The odometer reading at the last service or set to 0 (zero) for new vehicles
<b>Last Service Date</b>	The Date of the last service or set to the date of purchase.
<b>Odometer</b>	The current odometer reading needs to be regularly updated for this feature to function. See the section on Odometer entry on page 80 for methods of regularly updating the odometer reading.

## To Book a Vehicle in for Service

- 1 Click the new booking button
- 2 Set the dates and times to the times that the vehicle will be away for service.
- 3 In the driver field type **service** and press **tab**



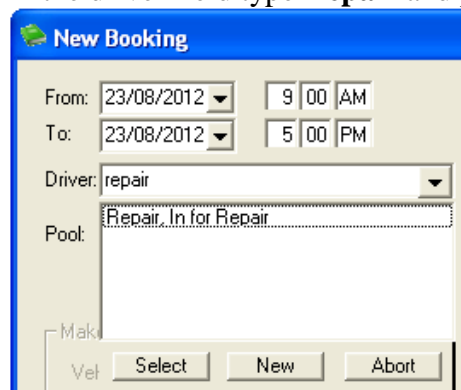
Double Click the **In for Service** Choice

- 2 Click the  Manual Vehicle Selection button and choose the vehicle that will be serviced.
- 3 Click **Save Booking**

The cost centre fields do not matter, as the booking will not be billed, as it is a **Service** Booking

## To Book a Vehicle in for Repair

- 1 Click the new booking button
- 2 Set the dates and times to the times that the vehicle will be away for service.
- 3 In the driver field type **Repair** and press **tab**



Double Click the **In for Repair** Choice

- 4 Click the  Manual Vehicle Selection button and choose the vehicle that will be serviced and Click **Save Booking**.

# Importing Users

If your organisation has a large number of users, it is easier and much quicker to import them into Open Fleet, from another database such as payroll, or even telephone/email directory.

In order to import users a CSV (Comma Separated Values) file of your users needs to be created. This can be done with the aid of Excel. Large organisations will be able to export their staff list from other systems.

**Importing users will only add new users. It will not update the details of existing users.**

The order of columns is important. See the screen shot below.

	A	B	C	D	E	F	G	H
1	Given	Surname	username	Phone	Mobile	email	LicenceNo	LicenseExpiryDate
2	Marion	Tristram	Titterton	64305987		Marion.Tristram@myorg.com.au	G21525	7-Jul-13
3	Chris	Belle	Belle		123456	Chris.Belle@myorg.com.au		
4	Meixue	Dyson				Meixue.Dyson@myorg.com.au	F540184	1-May-62
5	Melissa	Wright	Burr		321123	Melissa.Wright@myorg.com.au		
6	Anita	Douglas				Anita.Douglas@myorg.com.au	G0403139	22-May-11
7	Judith	Loder	Loder		123123	Judith.Loder@myorg.com.au		
8	Peter	Wallis				Peter.Wallis@myorg.com.au		
9	John	Gibson	Gibson			John.Gibson@myorg.com.au		
10	Christine	Daniel				Christine.Daniel@myorg.com.au	B245192	11-Aug-00
11	Vincent	McGee				Vincent.McGee@myorg.com.au		
12	Tony	Sands				Tony.Sands@myorg.com.au		
13	James	Crosswell	Crosswell			James.Crosswell@myorg.com.au		
14	Jane	Baynes				Jane.Baynes@myorg.com.au	G0318394	21-Feb-09
15	Robyn	Haddy				Robyn.Haddy@myorg.com.au		

Showing the order of columns in Excel.

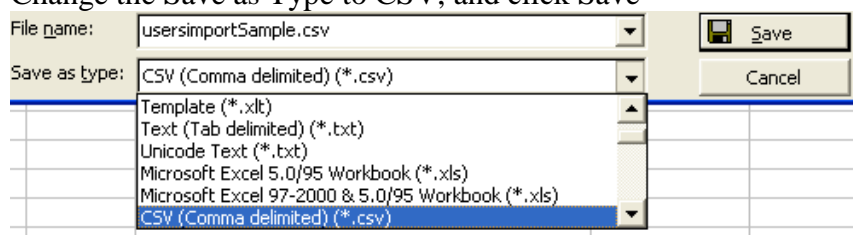
The order is

Given Name, Surname, Username, Phone, Mobile, Email, LicenceNo, Licence Expiry Date,


If any of the data is unknown then that column may be left blank.

## To Convert an Excel File to A CSV file

- 1 In Excel, Click File, Save As
- 2 Change the Save as Type to CSV, and click Save



## To Load a CSV file into Open Fleet

- 1 From the Menu Bar select **Tools, Import Users**.
- 2 Use the  Browse Button to locate the CSV file.
- 3 If the CSV file has a row with Headings, check the **Header Row** Box.
- 4 Click **Load File** button.

The CSV file will then be loaded into a Temporary Holding

File.

Enter File Location: C:\Documents and Settings\Jay\My Documents\CLIENTS\OpenFleet\usersimportSample.csv

Header Row ☒

Given	Surname	Username	Email	Mobile	Phone	Licence	Licence Expiry
Marion	Tristram	Titterton	Marion.Tristram@myorg.com.au		64305987		
Chris	Belle	Belle	Chris.Belle@myorg.com.au	123456			
Meixue	Dyson		Meixue.Dyson@myorg.com.au				
Melissa	Wright	Burr	Melissa.Wright@myorg.com.au	321123			
Anita	Douglas		Anita.Douglas@myorg.com.au				
Judith	Loder	Loder	Judith.Loder@myorg.com.au	123123			
Peter	Wallis		Peter.Wallis@myorg.com.au				
John	Gibson	Gibson	John.Gibson@myorg.com.au				
Christine	Daniel		Christine.Daniel@myorg.com.au				
Vincent	McGee		Vincent.McGee@myorg.com.au				
Tony	Sands		Tony.Sands@myorg.com.au				
James	Crosswell	Crosswell	James.Crosswell@myorg.com.au				
Jane	Baynes		Jane.Baynes@myorg.com.au				
Robyn	Haddy		Robyn.Haddy@myorg.com.au				

This list shows the entries that will be loaded into OpenFleet. The list should be visually checked to confirm the values look realistic and are in the correct column. Eg. Check that the Surnames are in the surnames column, the email in the email column etc.

☒ Prevent Duplicate Users

☐ Authorise all these users to drive

- 5 Check that the data is in the correct columns. The Given name should be in the first column, the Surname in the second etc.
- 6 If you do not want Duplicate users created then leave the **Prevent Duplicates** checked.
- 7 If you wish for all the imported users to be Authorised to drive the organisations vehicles, check the **Authorise all these users to drive** box.
- 8 Click **Import**.

## Problems

**If there is a problem loading the CSV file,**

- 1 Open Fleet may give you a row number where the problem exists. Note the number.
- 2 Open the CSV file in Excel. (Open Fleet will ask if you want to do this).
- 3 Go to the row number indicated in step one.
- 4 Look for rows out of place, or a date that isn't really a date. Correct the error. Save the file and try to Load the File again.
- 5 If the problem cannot be found, email the CSV file to support@ITGuaranteed.com.au



# Importing Fuel Transactions

Open Fleet can import fuel transactions from fuel companies.

When a fuel company card is used to pay for fuel, the Fuel Company records each transaction. Usually once a month, this information may be downloaded from the fuel companies computers. The resulting file may then be uploaded into Open Fleet. This file should be a CSV file.

Another advantage to importing the fuel file is that Open Fleet will automatically update the odometer values on vehicles if they are higher than the currently recorded odometer reading.

## File Formats

Each Fuel Company has its own file formats but Open Fleet can be configured to accept most of these.

### To configure Open Fleet for the fuel company file format,

- 1 From the menu bar select **Lists, Fuel Companies**

Fuel Company	inactive	Header	Currencyin100ths	Rego	Date	Odometer	Quantity	Total Cost	Card	Description	Location	Supplier	G S T Fuel	G S T Fees	Time	Cost Per Volume
B.P.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3	5	13	15	16	4		6	28				
Shell	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3	1	10	12	17	2	11	7	6				

The first column is the name of the fuel company.

The second column is an inactive flag, which can be ticked if the organisation does not use this fuel company any more.

The Header column is ticked to indicate if the first row of the file contains headings.

The Currencyin100ths column indicates if the currency is represented in 100ths rather than in normal currency.

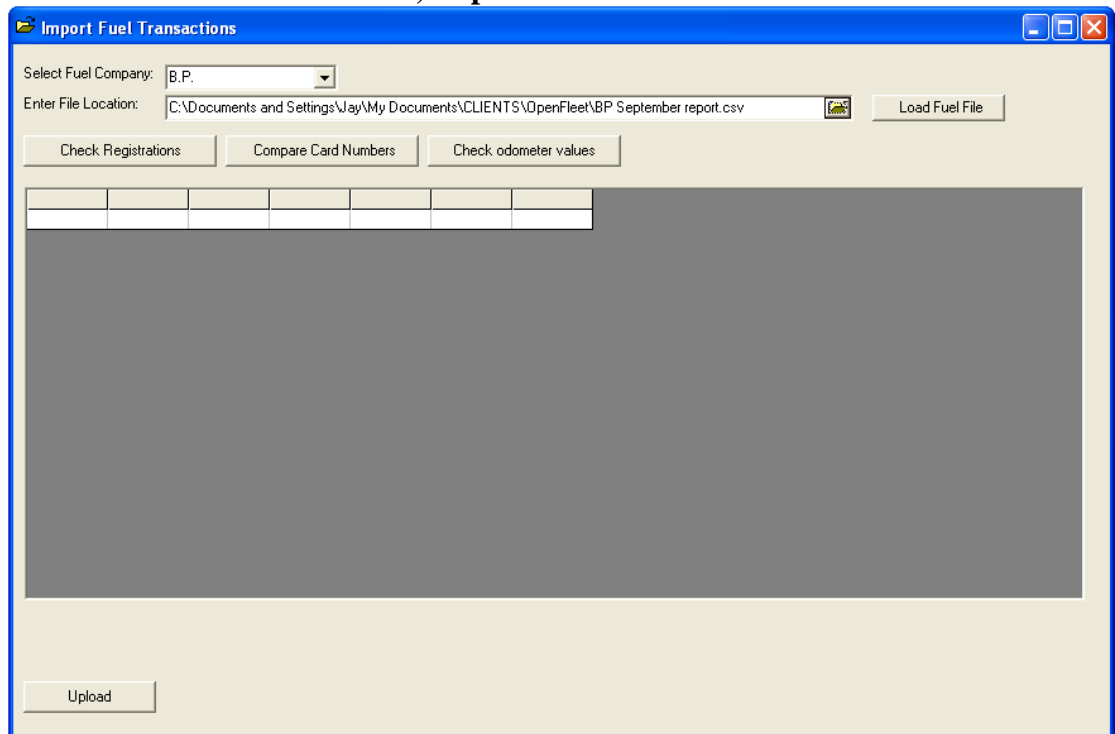
The remaining columns indicate the column number, or column position of that particular data in the file. For example in the example above both companies have the Rego in the 3<sup>rd</sup> column. B.P. has the date in the 5<sup>th</sup> column while Shell has the date in the 1<sup>st</sup> column.

New Fuel Companies may be added in the bottom row.

***If your organisation needs assistance with this process please email I.T. Guaranteed with a copy of the CSV, and any notes from the Fuel Company about the file format. I.T. Guaranteed will happily email the necessary settings.***

## To Import the Fuel Transactions file

- 1 From the menu bar select **Tools, Import Fuel Transactions**



- 2 Select the Fuel Company.
- 3 Select the File to be imported.
- 4 Click the **Load Fuel File button**.

Loading the file places it into a Holding File where it may be checked for errors and inconsistencies. As the files only go into a holding file, they can be loaded and reloaded as many times as necessary until it is correct. It is only once the file is posted that changes are made to Open Fleet.

Once a file is posted it may not be loaded again.

The file may now be examined for errors or inconsistencies. There are three buttons for this purpose, Check Registrations, Compare Card Numbers & Check Odometer Values.

### Check Registrations

The only critical check is the Check Registrations. Clicking this button will display the registrations that **do not** exist in Open Fleet. This means that transactions that are listed here will not be loaded into Open Fleet. There are two courses of action.

- If the vehicle listed does belong to the organisation, it is not too late to enter it now as a new vehicle, or to update its registration to the registration displayed on this screen. Once this is done click the **Check Registration** button again and that vehicles transactions should not now appear in this check meaning that they will be posted when the time comes.

- If the vehicle listed does not belong to the organisation then the fuel company should be contacted and the transactions disputed. It may be that the fuel card has the incorrect registration recorded against it on the fuel company's computer. If the CSV file is regarded as an invoice a new invoice should be requested. If auditing is not required then these mistakes may be ignored and the transactions listed will not be posted.

## Compare Card Numbers

This check shows the card numbers in the fuel file that do not match with the card numbers in the vehicles. If the card is listed in another vehicle then its whereabouts are displayed in the 'is in vehicle' column. If these transactions are posted, they might be allocated to the wrong vehicles. As they stand they will be allocated to the vehicle whose Registration number appears.

There are three courses of action.

- Correct the card number in the Open Fleet Vehicle screen
- Provide the fuel company with the correct vehicle registration for the card.
- Ignore the entry. This may be the case particularly for spare fuel cards that get swapped from card to card.

If the vehicle listed does not belong to the organisation then the fuel company should be contacted and the transactions disputed. It may be that the fuel card has the incorrect registration recorded.

## Check Odometer values

This check shows the odometer readings from the fuel company that are less than the current odometer reading according to the vehicle screen. These lower odometer values will not be updated on the vehicle screen.

The only action that need be taken is if the vehicle Odometer values in Open Fleet are out by a high ratio as indicated in the ratio out column. In this case the odometer values on the vehicle screen should be adjusted to the correct odometer reading.

## Posting

Posting the data is the action of taking the data in the holding file and adding it to the data in Open Fleet.

### To Post the Data

Once satisfied with the checks the data is ready to be posted.

- 5 Click the **Post** button

# Importing Fleet Management Fees

Open Fleet can import fleet management expenses from Fleet Management companies such as leasing companies.

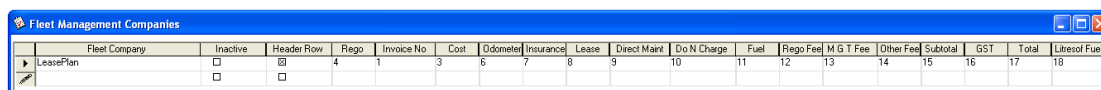
Each month a Fleet Management Company will apply charges to each vehicle. These charges and readings may include such items as Fuel, Lease Fees, Maintenance, Insurance, Lease Fees, Registration Fees, Management Fees and Do and Charge fees.

## File Formats

Each Fleet Management Company has its own file formats but Open Fleet can be configured to accept most of these.

## To configure Open Fleet for the Fleet Management company file format,

- ⑥ From the menu bar select **Lists, Fleet Management Companies**



Fleet Company	Inactive	Header Row	Rego	Invoice No	Cost	Odometer	Insurance	Lease	Direct Maint	Do N Charge	Fuel	Rego Fee	M G T Fee	Other Fee	Subtotal	GST	Total	Litres of Fuel
LeasePlan	<input type="checkbox"/>	<input checked="" type="checkbox"/>	4	1	3	6	7	8	9	10	11	12	13	14	15	16	17	18

The first column is the name of the Fleet Management company.

The second column is an inactive flag, which can be ticked if the organisation does not use this fuel company any more.

The Header column is ticked to indicate if the first row of the file contains headings.

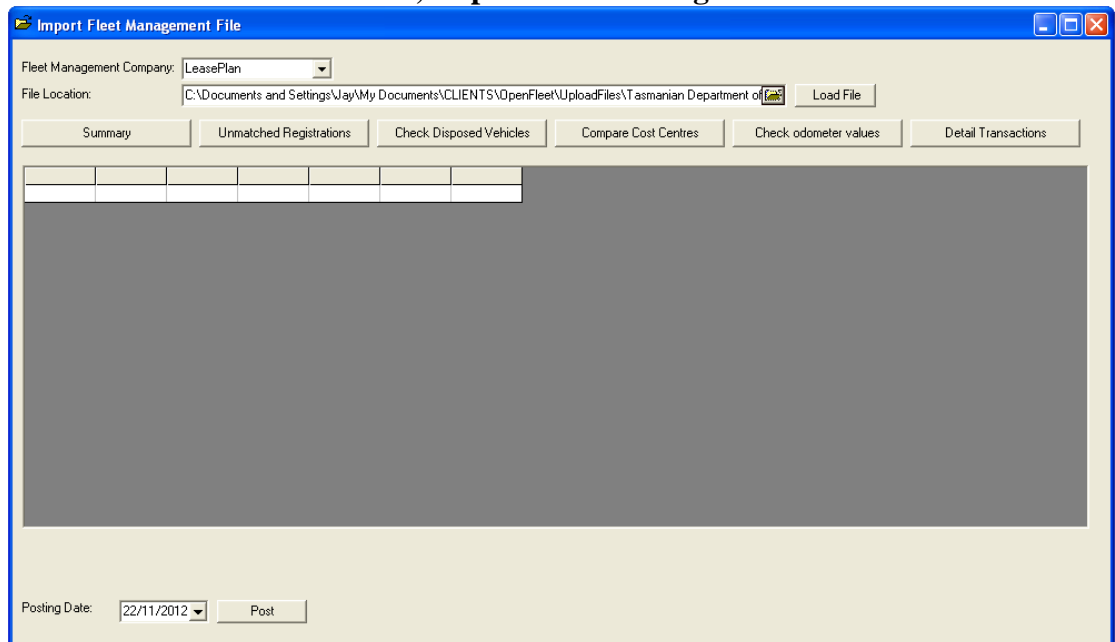
The remaining columns indicate the column number, or column position of that particular data in the file. For example in the example Lease Plan have the Rego in the 4th<sup>rd</sup> column, and the Invoice Number in the 1<sup>st</sup> column.

New Fleet Management Companies may be added in the bottom row.

***If your organisation needs assistance with this process please email I.T. Guaranteed with a copy of the CSV, and any notes from the Fuel Company about the file format. I.T. Guaranteed will happily email the necessary settings.***

## To Import the Fleet Management Transactions file

- 7 From the menu bar select **Tools, Import Fleet Management Fees**



- 8 Select the Fleet Management Company.
- 9 Select the File to be imported.
- 10 Click the **Load File button**.

Loading the file places it into a Holding File where it may be checked for errors and inconsistencies. As the files only go into a holding file, they can be loaded and reloaded as many times as necessary until it is correct. It is only once the file is posted that changes are made to Open Fleet.

Once a file is posted it may not be loaded again.

The file may now be examined for errors or inconsistencies. There are five buttons for this purpose, Summary, Unmatched Registrations, Check Disposed Vehicles, Compare Cost Centres and Check Odometer Values. In addition the detail of the transactions can be viewed by clicking the last button.

### Summary

The summary shows the totals of the various fees that will be posted. These totals should be checked against the invoice. If they do not match the most likely cause is that there are **unmatched registrations**. If the totals still do not match after unmatched registrations are corrected then the spreadsheet file should be checked using **sum()** functions.

### Unmatched Registrations

The only critical check is the Unmatched Registrations. Clicking this button will display the registrations that **do not** exist in Open Fleet. This means that transactions that are listed here will not be loaded into Open Fleet. There are two courses of action.

- If the vehicle listed does belong to the organisation, it is not too late to enter it now as a new vehicle, or to update its registration

to the registration displayed on this screen. Once this is done click the **Unmatched Registration** button again and that vehicles transactions should not now appear in this check meaning that they will be posted when the time comes.

- If the vehicle listed does not belong to the organisation then the Fleet Management company should be contacted and the transactions disputed. It may be that the Fleet Management Company has the incorrect registration recorded. If the spreadsheet is regarded as an invoice a new invoice should be requested. If auditing is not required then these mistakes may be ignored and the transactions listed will not be posted.

### Check Disposed Vehicles

This check lists the transactions for vehicles that have already been disposed.

It is not unusual to have transactions for recently disposed vehicles as final fees need to be invoiced, but if a vehicle was disposed over one or two months ago that fee should be examined for validity.

If a transaction is determined to be invalid then the fleet management company should be contacted for a new invoice.

### Compare Cost Centres

This check lists the cost centres that in the fleet management file that do not match with the vehicles in Open Fleet. There are three courses of action.

- Correct the cost centre in the Open Fleet Vehicle screen
- Provide the fleet management company with the correct Cost Centre.
- Ignore the entry. This may be the case particularly for vehicles that regularly swap cost centres.

The cost centre that is posted to the transaction will be the cost centre in Open Fleet vehicle screen.

### Check Odometer values

This check shows the odometer readings from the fuel company that are less than the current odometer reading according to the vehicle screen. These lower odometer values will not be updated on the vehicle screen.

The only action that need be taken is if the vehicle Odometer values in Open Fleet are out by a high ratio as indicated in the ratio out column. In this case the odometer values on the vehicle screen should be adjusted to the correct odometer reading.

## Posting

Posting the data is the action of taking the data in the holding file and adding it to the data in Open Fleet.

### To Post the Data

Once satisfied with the checks the data is ready to be posted.

- ① Enter a Posting Date. This is the date that will be applied to the transactions. It is strongly recommended that this date be the same day every month such as the last day of the month. It does not need to be the actual date that the button is pressed.
- ② Click the **Post** button

# Importing Odometer Readings

## Import from an Excel file

Another way to upload the odometer readings is from a saved Excel file.

Some organisations that have geographically disbursed vehicle home bases may prefer to have one individual in each location record the odometer reading for each vehicle in their location once a month in an Excel file.

	A	B	C	D	E	F	G
1	RegistrationNo	Odometer					
2	C64KF	10863					
3	C48TD	3150					
4	G05AP	30707					
5	C62HK	58006.2					

**Note:** The vehicle registration must be in the first column and the odometer reading must be in the second. Headings are optional.

## To open the Import Odometer window

- 1 Select Tools, Import Odometer Readings from the menu bar.

Enter File Location: C:\Documents and Settings\Jay\My Documents\CLIENTS\OpenFleet\odoreadings.csv

Header Row: ☒

Load File

Check Registrations Check odometer values Check Region Check Duplicates

Rego	Odometer
C64KF	10863
C48TD	3150
G05AP	30707
C62HK	58006
SPARE57	70747
G16AX	20587
G30BF	2713
C40YP	27
C98DB	33159
G22AQ	11200
G21AX	23372
G13AQ	15967
C17SI	5366
B60YZ	26993
C13EB	12790
C59DZ	2787
C69DA	41208
D52YN	43542
C58MG	14224

This list shows the entries that will be loaded into OpenFleet. The list should be visually checked to confirm the values look realistic and are in the correct column. Eg. Check that the Surnames are in the surnames column, the email in the email column etc.

Posting Date: 28/02/2013

Import Close



## Check Registrations

Clicking this button will display the registrations that **do not** exist in Open Fleet.

**These unmatched odometer readings will not be imported.**

There are two courses of action.

- If the vehicle listed does belong to the organisation, it is not too late to enter it now as a new vehicle, or to update its registration to the registration displayed on this screen. Once this is done click the **Check Registrations** button again and that vehicles transactions should not now appear in this check meaning that they will be posted when the time comes.
- If the vehicle listed does not belong to the organisation then it may be a typo. The creator of the Excel file has the incorrect registration recorded. The spreadsheet should be corrected and then Reloaded.

## Check Odometer values

This check shows the odometer readings from the Excel file that are less than the current odometer reading according to the vehicle screen. These lower odometer values will not be updated on the vehicle screen.

The only action that need be taken is if the vehicle Odometer values in Open Fleet are out by a large margin. In this case the odometer values on the vehicle screen should be adjusted to the correct odometer reading.

**If a vehicles current odometer reading on the vehicle screen is higher than the odometer reading in the Excel file the vehicle screen will not be updated.**

**If a vehicles previous actual monthly odometer reading in the Odometer file is higher than the odometer reading in the Excel file, the odometer readings will not be imported.**

## Check Region

If the user has set their region filter, then this check will display vehicles that are out of the user's region.

**These out of region vehicle's odometer readings will not be imported.**

## Check Duplicates

Check Duplicates will display registrations that are in the file more than once.

**If there are any duplicates, have the creator of the Excel file correct the file and load the file again.**

**DO NOT IMPORT THE FILE UNTIL THESE DUPLICATES ARE REMOVED.**

## Where are odometer readings stored?

There are two places where odometer readings are stored.

- The Vehicle Screen always contains the highest entered or imported odometer reading.
- The odometer table, soon to be shown on the Vehicle Screen, records the vehicles odometer reading at the start and end of every month.

## How odometer values are updated?

As detailed in previous sections odometer values may be imported into Open Fleet in a number of ways. Whichever way the odometer values are *imported* the following rules are applied.

- The new odometer record has kilometre start (Kilometres at start of month field) set to the previous (by date) kilometre reading. This may be a reading some months previous if no readings recorded for the immediate prior month/s.
- The odometer reading on the vehicle screen is updated to the new odometer reading unless the new reading is less than the odometer reading on the vehicle screen.
- A new odometer record is created for each odometer entry except for when the new odometer reading is less than previous odometer reading in the odometer table.

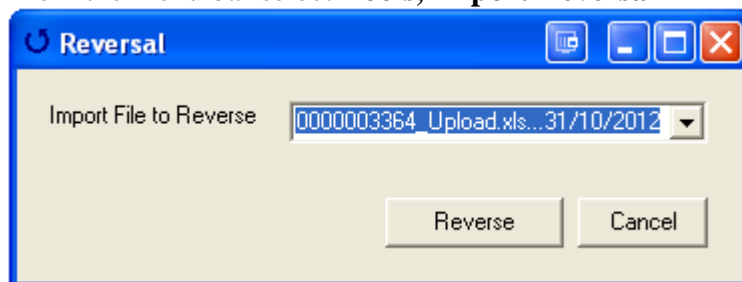
## Reversing Imports

Occasionally there may be a need to reverse an import. That is to make it like the import never occurred.

The only things that cannot be reversed are imported users and changes to the vehicles odometer field on the vehicle screen. Everything else such as expenses, and actual monthly odometer readings *that are imported from a file* can be reversed.

### To reverse an import

- 1 From the menu bar select **Tools, Import Reversal**



- 2 Select the file to be reversed.
- 3 Click **Reverse** and follow the prompts.

# Monitoring Tasks

## Daily

- Verify Drivers licenses for bookings that require it.
- Scan the running sheet for inefficiencies.
- Print out booking slips for the next day
- **BACK UP**
- 
- 
- 

## Weekly

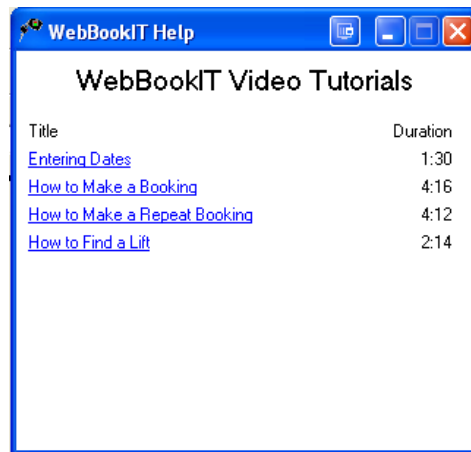
- Run the Exception Overview Report & correct any problems
- Run the **Due for Service** Report
- 
- 
- 
- 

## Monthly

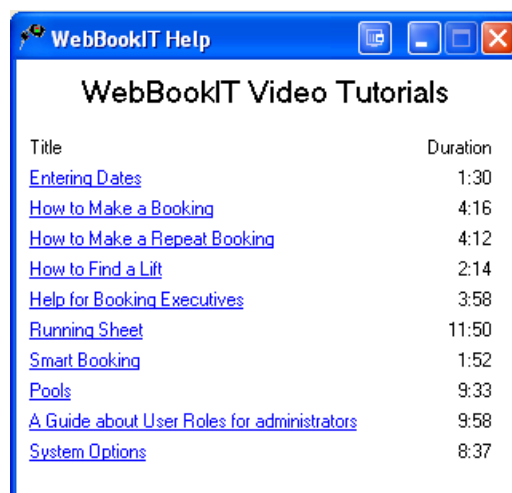
- Load the fuel files from the fuel companies. (Optional)
- Load the Fleet Management File (Optional)
- Load the Odometer File (Optional)
- Run the **Due for Replacement** report
- Send email to drivers whose licenses are about to expire.
- 
- 
-

## Video Help

Comprehensive video help is available for all users. It is tailored to the type of user.



**For example a Driver only gets access to the help videos which relate to their tasks.**



**But an administrator can see all help videos.**

Videos exist to explain the best way to use Open Fleet. It is in your interest to view them all.

# Support

Open Fleet Administrators are entitled to free telephone or email support. Prior to contacting support, Administrators should:

- Review the specific part of this training Manual.
- Send a manual Bug Report. (see below)
- Make a note of what you were doing at the time or the error message. A picture is worth a thousand words so if you can get a screen dump that assists significantly.

Other Open Fleet users should contact their Fleet Administrators for assistance.

### To take a screen dump

- ① To take a screen dump press the **Prt Scr** (Print screen) Button on your keyboard.
- ② Create a new email, right click in the body of the email and click paste

### To manually send a bug report

- ① Perform the action or function that is believed to be in error.
- ② Immediately, from the menu bar select **Help, Send Bug Report**.
- ③ Enter a description of the problem and click **Submit**.

## Support Contact Details

Email: [Support@ITGuaranteed.com.au](mailto:Support@ITGuaranteed.com.au)

Phone: 63263073

Mobile: 0419335310

## Previous Version

Open Fleet includes the ability to run the immediately prior version. So if it is believed the problem came in the last update and no resolution is imminent, running the previous version should be OK until a fix is issued.

### To run the immediate prior version

- ① Click the **Start button**, then **Programs, Open Fleet, Open Fleet (prior version)**

## Quick Support

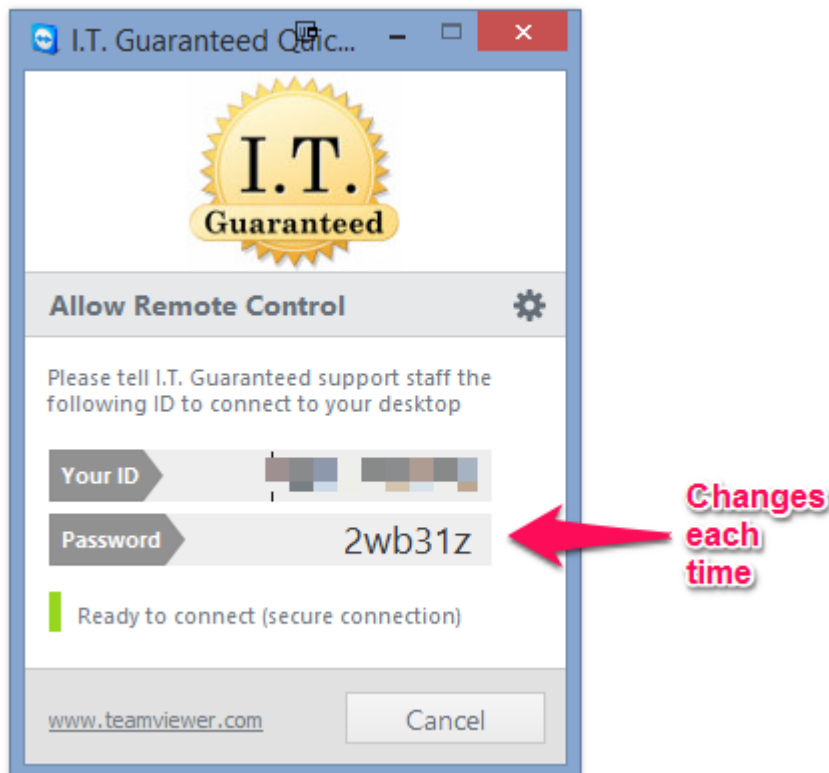
Users may initiate a remote support session with I.T. Guaranteed support staff. This will enable I.T. Guaranteed support staff to view the user's screen and control their computer.

This tool includes a number of security safe guards, including encryption and passwords.

Firstly, the remote control session must be started by the user. It cannot be started from I.T. Guaranteed.

Users can start this tool by going to the menu bar and selecting **Help, Quick Support**

Secondly, it also includes a unique password which is self-generated, and is different each time, and must be told to I.T. Guaranteed support staff (in a telephone call), before connection to the desktop is possible.



## Response Times

I.T. Guaranteed tries to respond to a support request within 2 hours. We will let you know what we are doing about the problem, and if possible let you know a work around or when it will be fixed.

I.T. Guaranteed will try to fully resolve the problem within 2 business days. This is not always possible but thus far we have managed to do this in 95% of problems.

# Data Field Glossary

## Vehicles Screen

Field	Description	Affects
ABS Brakes		
Air Conditioning		
Asset No	The Organisations Asset Number.	
Bonnet Protectors		
Bull Bar		
Canopy		
Cargo Barrier		
CO2 emissions	The amount Carbon Dioxide emitted.	
Colour	Vehicle Colour	
Comments	A space to enter anything else about the vehicle, however with the addition of dated notes being able to be added in the expense section this field is kept for older databases only.	
Contact Person	Individual to contact about vehicle (usually in another department)	
Contact Phone	The phone number of the employee that manages this vehicle	
Cost Centre	Which cost centre is responsible for this vehicles expenses	
Credit Cost Centre	The cost centre which will receive the funds from the sale.	
Cruise Control		
Date Disposed	The date the vehicle leaves ownership of the organisation.	KPI:Vehicles Owned & Disposed, Vehicle Utilisation Report
Date First Registered	The Date the vehicle was first registered	
Date of Manufacture	Date on the vehicles compliance plate	
Date Ordered	The date the order was made.	
Date Purchased	The Date that the Vehicle Arrives	Vehicles on order report (will show in this report while Date Purchased is blank)  Once iDate Purchased is not blank the vehicle will show in ( Vehicles report Asset List Vehicles Registration Expiry Report Vehicles Purchased Report Home Garaged Vehicles Report Vehicles in Cost Centre Non-vehicles Vehicles Average Daily KLMs report)
Disposal Method	How was the car sold?	
Disposed	Indicates if the car has been disposed.	If checked, the vehicle will no longer display in reports or be available for



		booking. The vehicle will now display on the disposal report.
Driver	Individual who is currently permanently assigned this vehicle	
Driver	Who is the permanently allocated driver for this vehicle?	Information about the driver comes from the Users
Drop Side Tray		
Due for Replacement date	The date at which the vehicle should be replaced.	Due for Replacement Report
Due for Replacement KLMs	The odometer reading at which the vehicle should be replaced.	Due for Replacement Report
Engine No	Engine Number on the vehicles compliance plate	
Engine Size	Engine Capacity Eg. 3 Litre	
Exclude From Utilisation Reports	An indicator that this vehicle should not be included on utilisation reports	Prevents this vehicle from showing on Utilisation Reports
Existing Damage	A space to enter existing damage on the vehicle.	Printed on pool Booking Slip to let drivers know the organisation is aware of the damage.
Expected Delivery Date	When is the new vehicle expected to arrive from the dealer.	
Final KLMs	The last odometer Reading.	
Fire Extinguisher		
First Aid Kit		
Fuel Card 1 Pin	The PIN for the 1 <sup>st</sup> fuel card.	
Fuel Card 2 Pin	The PIN for the 2 <sup>nd</sup> fuel card.	
Fuel Card No 1	The number on the 1 <sup>st</sup> Fuel Card	
Fuel Card No 2	The number on the 2 <sup>nd</sup> Fuel Card	
Fuel Company Card 1	The fuel company of the 1 <sup>st</sup> fuel card	
Fuel Company Card 2	The fuel company of the 2 <sup>nd</sup> fuel card	
Fuel Type	Usually Unleaded or Petrol	
Funded By	The cost centre that funded the purchase of the vehicle.	
Green Guide	A place to enter the Green Guide rating	
Headlamp Protectors		
Home Garaged	Is the vehicle permitted to be kept at the driver's private residence?	If used as a pool vehicle then it can only be booked out during the office hours set in Options. The running sheet will show it as unavailable after hours and on weekends.
Home Garaging Reason	Why is the vehicle Garaged at a private Residence?	
Hybrid	Does the vehicle have a hybrid engine?	
Invoice No	The suppliers invoice number.	
Keys Back	An indicator to advise if the keys of the vehicle have been returned.	
Last Service Date	The date the vehicle was last serviced	Due for service report.
Last Service KLM	The odometer reading the last time	Due for service report.

	the vehicle was serviced	
Lease Price	The monthly cost of the lease.	
Ledger	Which Ledger do expenses get posted to?	
Lights and Sirens		
Location	A location the vehicle is kept	
Mat Set		
Model	The model and Make of the vehicle	
Non Vehicle	Is this a trailer, a boat or a mower	If yes then the vehicle is not shown in these reports. Vehicles, KPI Vehicle count, Vehicle Due for Replacement (only if Due for Replacement Date is blank), Vehicle Registration (only if Registration Expiry is blank), Vehicles Average Daily Kms
Odometer	The current vehicles odometer reading	
Order No	The organisations official order number to purchase the vehicle	
Order Price	The price listed on the order form.	
Phone		
Pool	Which pool (if any) does the vehicle belong in.	
Pool Booking Slip Message	The specific message that is printed on the pool booking slip about this vehicle.	
Premium Class	The Vehicles Premium Class according to the motor registry department / DMV	
Project	Which Project do expenses get posted to?	
Purchase Method	Leased or Purchased	
Purchase Price	The final Purchase Price	
Radio Pin	The PIN code for the radio after the battery has been removed	
Region	The region that this vehicle belongs in.	When Region filter is used, only vehicles that are in that fleet administrators region are shown on reports.
Registration Expiry	The expiry date of the registration	
Registration No	The number on the number plate	
Replaced by	The registration number of the vehicle that replaces the current vehicle.	Replaces field on the new vehicle that replaces the current one.
Replaces	The registration number of the vehicle being replaced	Replaced By field on the vehicle being replaced.
Requisition Number	The organisations internal authorisation number to purchase the vehicle	
Reverse Park Sensor		
Roof Cross Bars		
Sale Item No	The Item number in the Sales Agents Catalogue.	

Sales Tax		
Security Gate No	A place to enter a security gate Number if required	
Service	Service Schedule according to the owners handbook	Due for service report.
Sold Price	The amount the vehicle sold for.	
Sold To	The name of the New Owner.	
Start Kilometres	The odometer reading when the vehicle was purchased.	
Suburb	The suburb where vehicle is kept	When using the Find a Lift screen, Only bookings for vehicles housed in the corresponding suburb are displayed. This is how Open Fleet knows where the vehicle is coming from and where it is returning to.
Supplier	The Supplier or Dealer who provides the vehicle.	
Tariff	The billing rate at which hire of the vehicle is charged out when booked	
Term	Term of the Lease	
Towbar		
Transmission	Automatic or manual or other...	
Two Way		
Tyre Size	Size of tyre	
Vehicle ID No	A place for an organization to enter its own internal numbering system for its vehicles	
Vehicle Usage	Either Salary, General Pool, or Department	
VIN	Vehicle Identification Number on the vehicles compliance plate	
Winch		

## Technical Specifications

Description	Open Fleet is an executable program that communicates with a database housed on a SQL server (or optionally, a local database) to allow end users to manage vehicle fleets.
Operating System	Open Fleet is successfully running on Windows XP, Vista, Windows 7 & 8 computers with no problems caused by choice of operating system.
Hardware	If your system runs the above operating system your hardware meets the requirements of Open Fleet
Communications	Open Fleet uses TCP/IP to communicate with the SQL server,
Firewall	The port designated by the SQL administrator needs to be open, Typically this is port 1433. Contact your SQL administrator for further details.
Anti-virus programs	Anti-Virus programs should not inhibit the running of Open Fleet and to date have not caused any issues.
Security implications	Open Fleet has been designed to install with only Standard User permissions. It has even installed on computers with a hidden C drive. It could be installed on USB key if this was required.
Username/passwords	Open Fleet utilises the authentication that has already occurred when the user logged onto Windows. As such doesn't require any further username/password authentication. It doesn't check passwords at all, merely uses the username of the currently logged on user to access the database.
Outlook Integration - Email and Calendaring Functions	These functions are dependent upon your installation of Outlook. Depending how Outlook is configured in your organisation it may or may not work.